Innovations in Call Recording and Contact Center Solutions

cc: Discover Reporting Manual, v5.2 R3

August 2013

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Note: Applicable non-disclosure agreements must be in force for authorization.

Revision History			
Revision	**Change Description**	**Author**	**Effective Date**
0	Added browser limitations for Zoom and Print functions in report navigation bar. Added Ad Hoc Reports section.	MBuckingham	2013-05-31
1	Noted saved report criteria caveat when editing existing reports.	MBuckingham	2013-07-18
2	Noted logged users audit trail behavior across logout events on different systems/browsers.	MBuckingham	2013-08-13
3	Explained that custom logos can be applied to exported reports.	MBuckingham	2013-08-27

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Introduction

The cc: Discover Reporting module enables users to generate and save or print reports as well as find real-time data about the system. This information provides:

- Quality Assurance managers insight into the performance of employees and business processes.
- System administrators knowledge about cc: Discover's performance and actions taken in the system.

This document explains:

- How to navigate the Reporting module and use its functions.
- The information that appears on the reports.
- How to create and manage reports.

Notes

cc: Discover allows administrators to customize field names and terminology in the Web Portal to fit your unique environment. Therefore, screen examples and field names used in this manual may differ from those seen in your implementation.

Several cc: Discover features use context menus and other windows that may be considered as "pop-ups" by some browsers. Uptivity recommends that you configure your browser to allow pop-ups for the cc: Discover site.

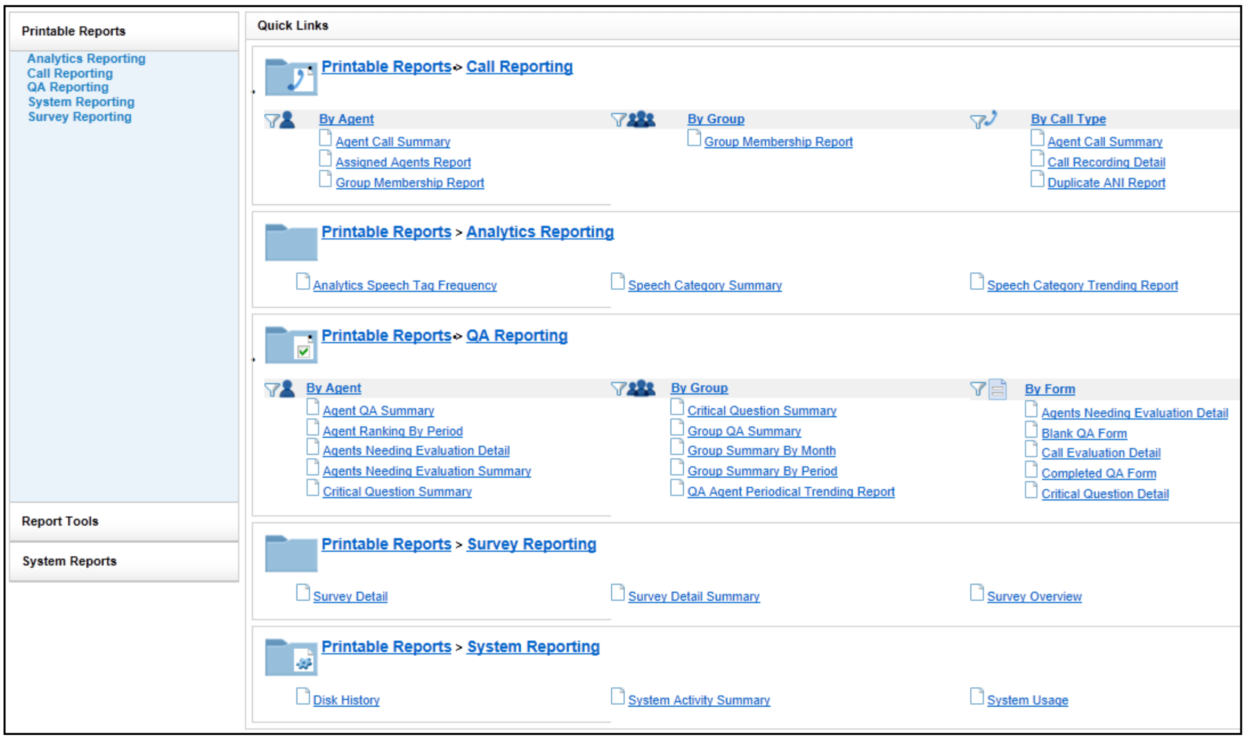
Due to the differences in how dates are handled in American and British English, cc: Discover supports only en-US for reporting.

Reporting Basics

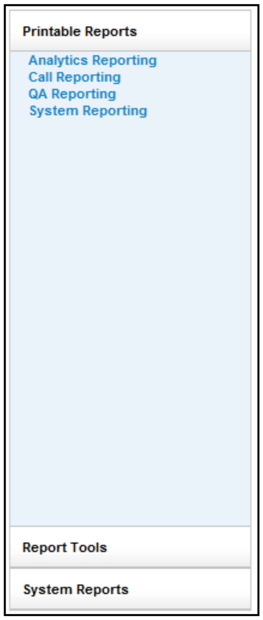
Quick Links Page

Upon clicking the Reporting tab in the upper left-hand corner of the cc: Discover web portal, you will access the page seen below. The Quick Links page shows them organized by a filter such as Group. Individual printable reports can be accessed from this page by clicking on the name of the report (shown in blue underlined font).

These reports are also available from the menus on the left side of the Reporting tab.



Reporting Tab Navigation



The menus on the left side of the Reporting tab provide access to reports and tools.

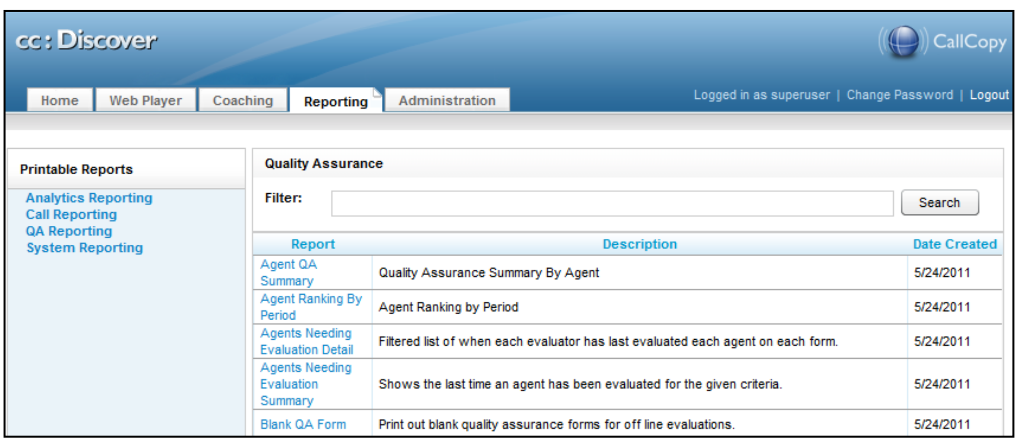
The Printable Reports menu has these links:

- **Analytics:** These reports are available only if the cc: Analytics module for analyzing call records has been purchased.
- **Call Reporting:** These are the Agent Reports on the Quick Link page.
- **QA Reporting**
- **System Reporting:** See also the System Reports menu.
- **Survey Reporting:** These reports are available only if the cc: Survey module has been purchased.

The Report Tools menu provides access to tools for automatically generating reports (subscriptions) and report libraries.

The System Reports menu provides administrators with the ability to monitor the health and performance of the system and to audit actions taken on the system. These reports cannot be printed.

Clicking a link, such as QA Reporting, displays that list of report types. The Date Created column indicates the date that the XML file used to generate this report type was installed in the cc: Discover system.



The Filter allows you to search for a particular report type based on the name of the report or a key word. For example, "Agent" entered into the Filter field as a key word will bring up all of the report types with ‘agent’ in either the report name or description.

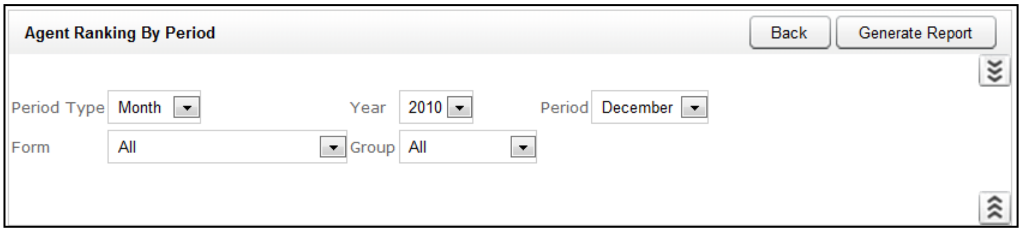
Click a report name to open a page for generating that report.

Printable-Report Functions

These tasks can be performed when using printable reports.

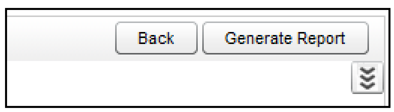
Specify Criteria and Create a Report

Each report has criteria that must be set to select data. These criteria can include date ranges, user or agent selections, and other data fields depending on the report type. Once you have the report criteria entered, click the **Generate Report** button to create the report.

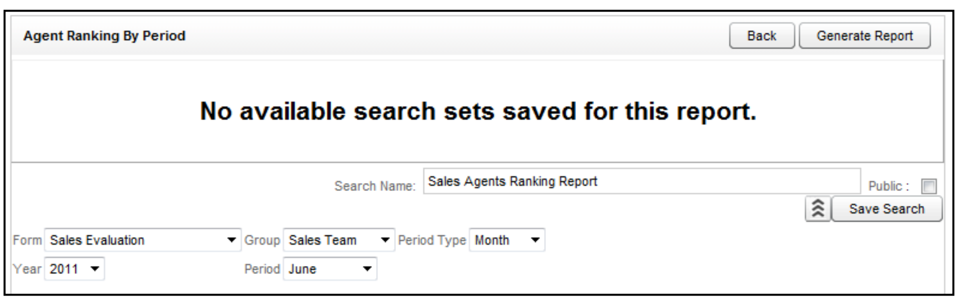


Save Report Search Criteria

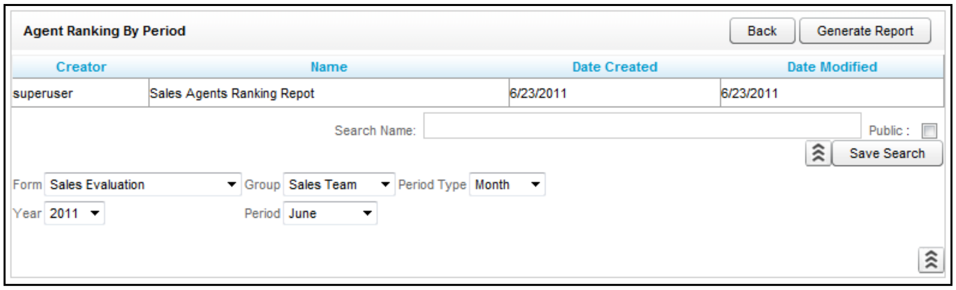
You can save the criteria for reports that are created frequently. Click the inverted chevron icon to see a list of saved report search criteria.



Enter a name for the report in the Search Name field. Select the Public box only if you want others to be able to view your saved report. Then click **Save Search**.

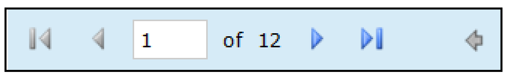


The report criteria item appears on the page. To use these criteria again, click the item. A report page with the criteria opens. Edit the criteria as needed. Then, click **Generate Report** to create the report. All saved report criteria appear in the Report Tools' Report Library.



Navigate Report Pages

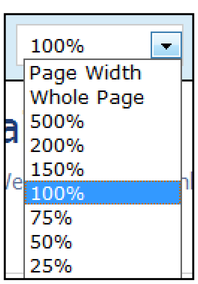
Use the navigation menu to move back and forth across appropriate report pages. The single arrow to the right takes you forward one page and the single arrow to the left takes you back one page. The double arrow to the right takes you to the last page of your report and the double arrow to the left takes you to the first page in your report.



Navigate Report Details

Some reports provide additional details in related reports. The mouse pointer turns to a hand if an item in a report has additional detail. The arrow allows you to go up one level if you have "drilled down" into a report.

Zoom



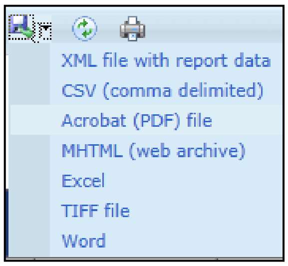
Use the zoom menu to format the size of the report output in your browser window.

> **Note** This feature is only supported in Internet Explorer. This is a limitation of Microsoft ReportViewer web server controls.

Search

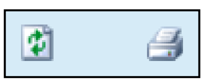
Use the search input box to find specific text or values within the report. Select "Find" to find the first option, then "Next" to find subsequent matches.

Save and Export a Report



From the report management interface, choose an option from the "Select a Format" drop-down menu. Choose the preferred format, and then press "Export" to output your report to the selected format. Exporting a report to a format that can be edited allows applying custom company logos in place of CallCopy's if desired.

Refresh and Print

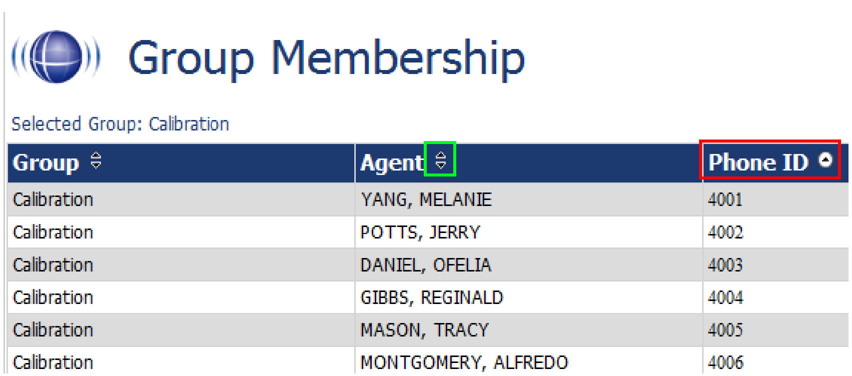


The refresh button reloads the report display after any formatting changes were made. The print button brings up the Windows print controls with standard print options available.

> **Note** The Print feature is only supported in Internet Explorer. This is a limitation of Microsoft ReportViewer web server controls.

Sort Report Records

Data records on some printable reports can be sorted. To sort from highest-to-lowest or A-to-Z, click the top triangles by a column label. To sort from lowest-to-highest or Z-to-A, click the bottom triangle. In this example, the records are sorted by the Phone ID as indicated by the icon. To clear all sorts, click the **Refresh** button.


Group Membership

Selected Group: Calibration

Group	Agent	Phone ID
Calibration	YANG, MELANIE	4001
Calibration	POTTS, JERRY	4002
Calibration	DANIEL, OFELIA	4003
Calibration	GIBBS, REGINALD	4004
Calibration	MASON, TRACY	4005
Calibration	MONTGOMERY, ALFREDO	4006

Common Report Criteria

Start Date

Indicates the start of the date range from which reporting data will be pulled. The Start Date can be selected by clicking on the calendar icon located to the right of the field, or by typing the date into the field.

End Date

Indicates the end of the date range from which reporting data will be pulled. The End Date can be selected by clicking on the calendar icon located to the right of the field, or by typing the date into the field.

Group

Allows you to select a particular group of Agents to report on. This is based on the groups of Agents that have been created in the system under the Administration tab. You can select one group, multiple groups (by shift-clicking), or all groups.

Call Direction

Allows you to narrow the scope of the report by selecting the directionality of the call to report on. Options in this selection are: All, Incoming, Outgoing, or Unknown (meaning that we are not able to identify the directionality of the recorded contact).

Period Type

Allows you to narrow the scope of the report by selecting the duration of time to report on. Options in this selection are: Week, Month, Quarter, and Year.

Year

Allows you to narrow the scope of the report by selecting the year to report on.

Period

The Period field is used with the Period Type, and the selections will be varied based on what is selected in the Period Type dropdown. For example, if the Period Type selected is Month, the Period options will be the months of the year. If the Period Type is Quarter, the Period options will be 1 – 4.

Form

Allows you to select the form that you want to report on. The available options are a reflection of the forms that have been built in the Form Creator and have either active or inactive (disabled) status. You can select one form, multiple forms (by shift-clicking), or All.

Agents

Allows you to select the Agent(s) that you want to report on. You can select one Agent, multiple Agents (by shift-clicking), or All.

Tag Category

Only used in conjunction with Speech Analytics. Allows you to select a particular Tag to report on. You can select one Tag, multiple Tags, or ALL.

Status/Active

Allows you to choose the status of the Agents to report on. Options are: Active, Inactive, and All.

Date Type

Used to select the data set you want to pull in QA reporting. Options are: Call Date and Evaluations Date. Call Date is based on the date the call was recorded in the system. Evaluation date is based on when the recorded contact was evaluated in the system.

Users

Allows you to select the User(s) that you want to report on. You can select one User, multiple Users (by shift-clicking), or All.

Report Type

Allows you to narrow the scope of the report by selecting the type of report to generate. Options in this selection are: Agent, Form, Section, and Question. This is one indication that a report is able to be drilled down into, to access the additional data that supports the cumulative view of the data.

Section

The Sections dropdown is used in conjunction with the Form dropdown and the selections will be a reflections of the sections created for a form in the Form Creator. You can section one section, multiple sections, or All.

Failure Type

Allows you to report on Section or Form failures for a particular form. You can also report on All.

Month

Select the starting month for your report.

Periods

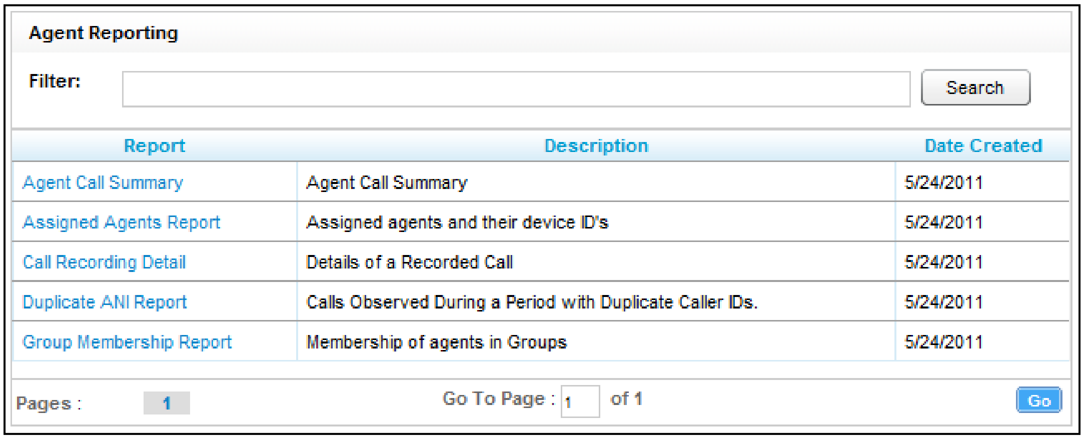
Select the number of months that you want to include in your report (1 -12).

Call Reporting

Overview of Call Reporting

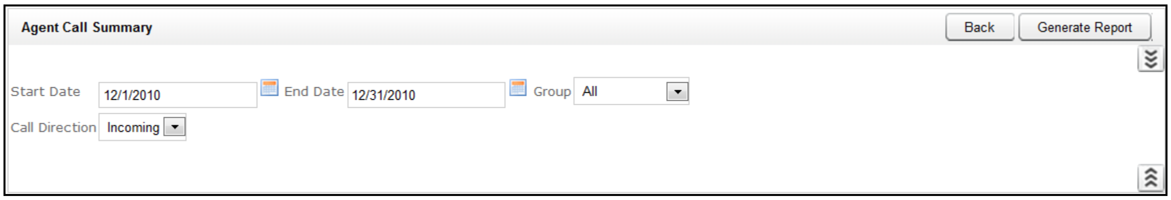
The cc: Discover Call Reports provide information about calls, such as the ANI and DNIS, and agents, such as the total number of calls that were recorded for an agent over a period of time.

To access call reports, from the Printable Reports menu, click **Call Reporting**. On the Agent Reporting page, click the link to a report type such as Agent Call Summary.



Agent Call Summary

The Agent Call Summary displays call totals captured in the call recording system. The report displays the number of calls recorded for an agent over a period of time, as well as the recording duration information. The recording duration may include on-hold and after call work depending on the customer's specific configuration and the recording scripts used. The report results returned are limited to groups with which the logged-in user shares a role.



Agent Call Summary

For period beginning 12/1/2010 and ending 12/31/2010

Selected Call Direction: Incoming

Name	Device ID	# Calls	Average Duration	Total Duration	Max Duration
ASHLEY, RUBEN	4022	16	5m 26s	1h 27m 2s	8m 11s
BAUER, ALBERT	4002	10	5m 43s	57m 9s	8m 11s
BELL, ESTER	4036	9	6m 20s	57m 1s	8m 11s
BROOKS, LARRY	4030	12	6m 16s	1h 15m 17s	8m 11s
CANTRELL, MADELEINE	4015	13	6m 7s	1h 19m 36s	8m 11s
COHEN, JIMMIE	4010	11	6m 17s	1h 9m 5s	8m 11s
DELACRUZ, BARRY	4026	23	5m 28s	2h 5m 42s	8m 11s
DILLON, BRADLEY	4031	14	5m 17s	1h 13m 58s	8m 11s
ESTES, SALVADOR	4033	12	5m 44s	1h 8m 48s	8m 11s
EWING, WILLA	4025	13	6m 50s	1h 28m 56s	8m 11s
FARRELL, HALEY	4032	15	5m 45s	1h 26m 16s	8m 11s
FISCHER, HOWARD	4029	9	6m 39s	59m 52s	8m 11s
FOSTER, HAROLD	4038	11	6m 15s	1h 8m 49s	8m 11s
GARCIA, MICHEAL	4014	17	5m 35s	1h 34m 53s	8m 11s
GRAY, SHAWN	4013	10	5m 43s	57m 7s	8m 11s
HAYS, ANGELINA	4034	14	6m 21s	1h 28m 59s	8m 11s

Assigned Agents Report

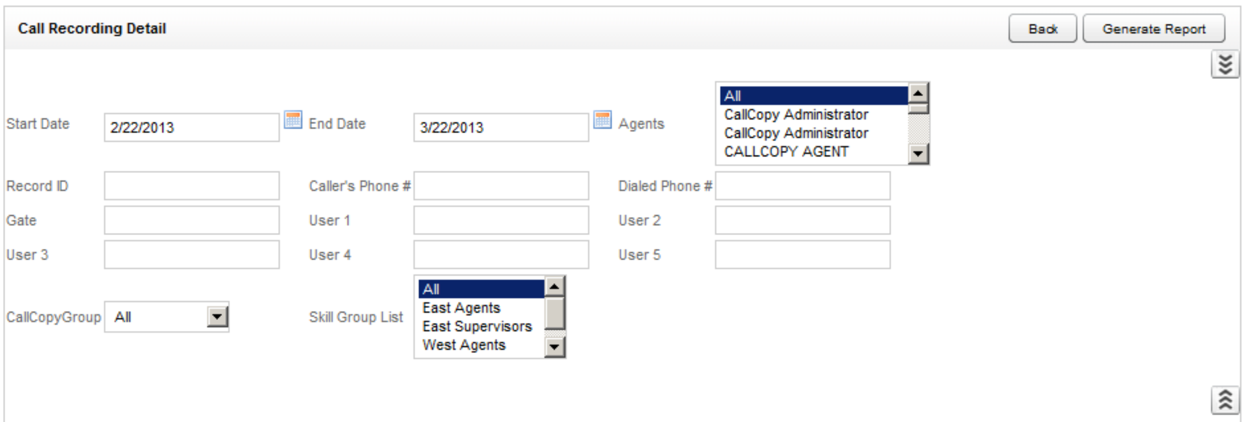
This report displays the Active, Inactive, or All agents who are currently in the database, along with their System ID, Username (System Username), and Phone ID information. An agent is Active if the Agent option has been enabled in the agent profile. An agent is inactive if the Agent option was selected at one point and that option is now cleared. The permission "Allow Viewing Call Reports" is needed for a user to have access to the Reporting Tab. In order to view agents other than the logged in user for this report, the permission "Allow Viewing of All Recordings" is required, but this will also allow the user to view and play back all call recordings.

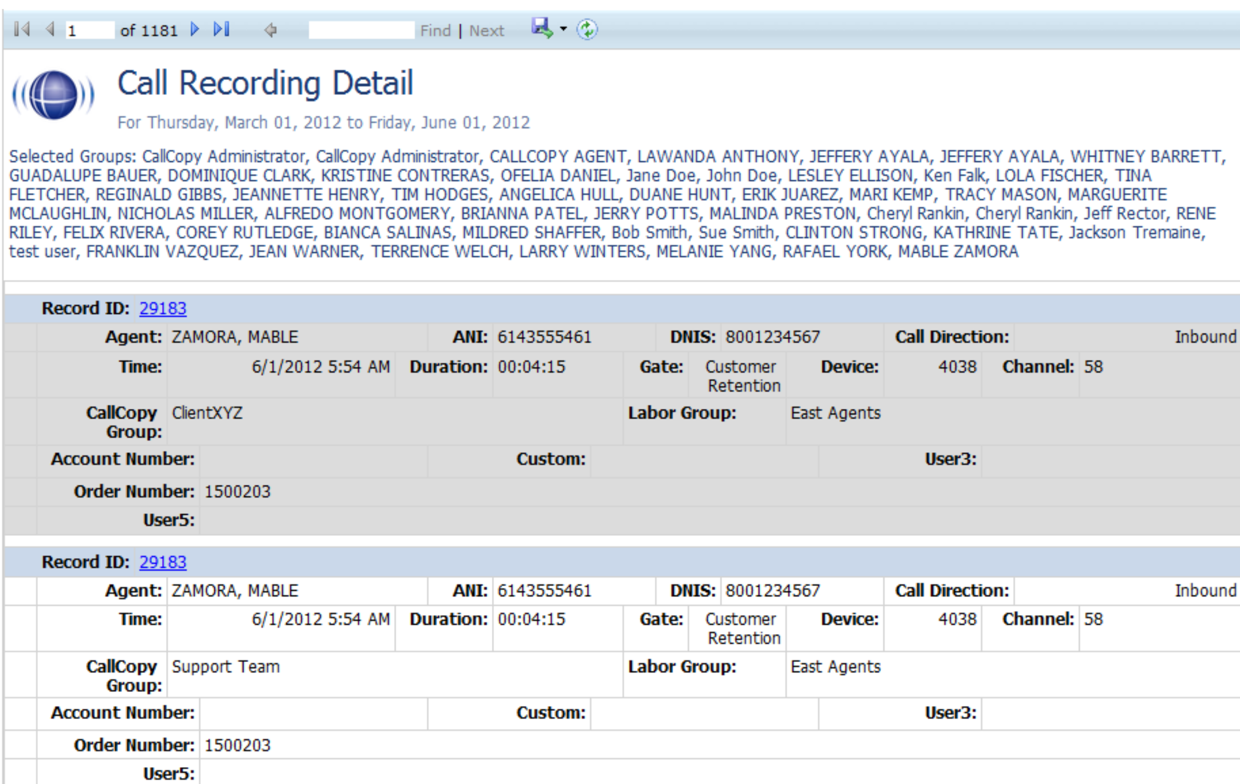
Assigned Agents

System ID	Agent	User Name	Status	Phone ID
1	SOLOMON, DUANE		Active	4001
2	BAUER, ALBERT		Active	4002
3	PECK, LUPE		Active	4003
4	JONES, MARVIN		Active	4004
5	MCDONALD, ANTHONY		Active	4005
6	NIEVES, LATONYA		Active	4006
7	HOOPER, LARRY		Active	4007
8	OCHOA, YOUNG		Active	4008
9	JIMENEZ, JUNE		Active	4009
10	COHEN, JIMMIE		Active	4010
11	USER, CALLCOPY	Administrator	Active	4011
12	HOLDEN, ANTHONY		Active	4012
13	GRAY, SHAWN		Active	4013
14	GARCIA, MICHEAL		Active	4014
15	CANTRELL, MADELEINE		Active	4015
16	SAMPSON, THERESA		Active	4016
17	SLOAN, SHAWN		Active	4017
18	ZIMMERMAN, KARINA		Active	4018
19	SCHNEIDER, EVANGELINA		Active	4019
20	HORN, ERIK		Active	4020
21	PADILLA, MARLENE		Active	4021
22	ASHLEY, RUBEN		Active	4022
23	NOEL, CARLA		Active	4023
24	MOSES, DIANA		Active	4024
25	EWING, WILLA		Active	4025
26	DELACRUZ, BARRY		Active	4026
27	WARD, JON		Active	4027
28	SALINAS, JIMMY		Active	4028
29	FISCHER, HOWARD		Active	4029

Call Recording Detail

This report displays the call metadata for your selected agent(s) over a period of time. The report provides the Record ID number, along with CallCopy group and skill group list, critical data like ANI, DNIS, Date and time recorded, duration of the call, and the Device ID where the call was recorded. The User fields are defined on the Terminology page and vary by customer. The report results returned are limited to groups with which the logged-in user shares a role.





Call Recording Detail

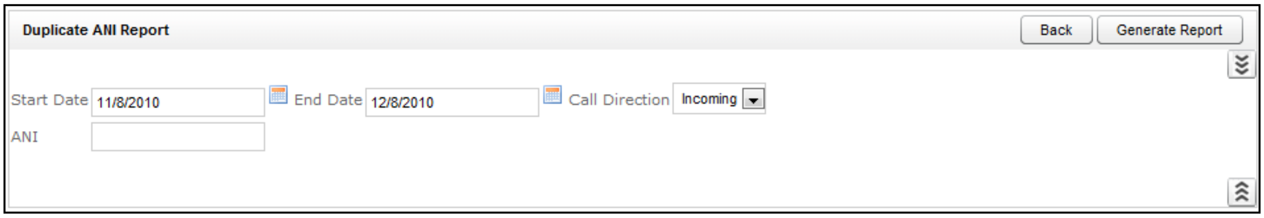
For Thursday, March 01, 2012 to Friday, June 01, 2012

Selected Groups: CallCopy Administrator, CallCopy Administrator, CALLCOPY AGENT, LAWANDA ANTHONY, JEFFERY AYALA, JEFFERY AYALA, WHITNEY BARRETT, GUADALUPE BAUER, DOMINIQUE CLARK, KRISTINE CONTRERAS, OFELIA DANIEL, Jane Doe, John Doe, LESLEY ELLISON, Ken Falk, LOLA FISCHER, TINA FLETCHER, REGINALD GIBBS, JEANNETTE HENRY, TIM HODGES, ANGELICA HULL, DUANE HUNT, ERIK JUAREZ, MARI KEMP, TRACY MASON, MARGUERITE MCLAUGHLIN, NICHOLAS MILLER, ALFREDO MONTGOMERY, BRIANNA PATEL, JERRY POTTS, MALINDA PRESTON, Cheryl Rankin, Cheryl Rankin, Jeff Rector, RENE RILEY, FELIX RIVERA, COREY RUTLEDGE, BIANCA SALINAS, MILDRED SHAFFER, Bob Smith, Sue Smith, CLINTON STRONG, KATHRINE TATE, Jackson Tremaine, test user, FRANKLIN VAZQUEZ, JEAN WARNER, TERRENCE WELCH, LARRY WINTERS, MELANIE YANG, RAFAEL YORK, MABLE ZAMORA

Record ID:	29183								
Agent:	ZAMORA, MABLE	**ANI:**	6143555461	**DNIS:**	8001234567	**Call Direction:**	Inbound		
Time:	6/1/2012 5:54 AM	**Duration:**	00:04:15	**Gate:**	Customer Retention	**Device:**	4038	**Channel:**	58
CallCopy Group:	ClientXYZ			**Labor Group:**	East Agents				
Account Number:		**Custom:**		**User3:**					
Order Number:	1500203								
User5:									
Record ID:	29183								
Agent:	ZAMORA, MABLE	**ANI:**	6143555461	**DNIS:**	8001234567	**Call Direction:**	Inbound		
Time:	6/1/2012 5:54 AM	**Duration:**	00:04:15	**Gate:**	Customer Retention	**Device:**	4038	**Channel:**	58
CallCopy Group:	Support Team			**Labor Group:**	East Agents				
Account Number:		**Custom:**		**User3:**					
Order Number:	1500203								
User5:									

Duplicate ANI Report

This report displays the call metadata information for repeat calls into your organization from the same phone number over a period of time. If the same ANI has not called into your location multiple times over your selected timeframe, you will see the result listed below. This can be useful for determining whether a specific customer or company calls in on a regular basis.



Duplicate ANI Report

For Saturday, April 23, 2011 to Friday, December 23, 2011

Status: All

ANI like: '1112223333'

ANI	# Calls Observed
1112223333	3

Duplicate ANI Report - 6/23/2011 CallCopy Recorder Reporting Service Page 1 of 1

Group Membership Report

This report displays the active or inactive Agents in a particular group, along with their Phone Id information. When selecting "All" in the Group menu, only groups that share a role with the logged in user will be displayed in the report.

Group Membership

Group	Agent	Phone ID
Calibration	ASHLEY, RUBEN	4022
Calibration	BAUER, ALBERT	4002
Calibration	BELL, ESTER	4036
Calibration	BROOKS, LARRY	4030
Calibration	CANTRELL, MADELEINE	4015
Calibration	COHEN, JIMMIE	4010
Calibration	DELACRUZ, BARRY	4026
Calibration	DILLON, BRADLEY	4031
Calibration	ESTES, SALVADOR	4033
Calibration	EWING, WILLA	4025
Calibration	FARRELL, HALEY	4032
Calibration	FERGUSON, LATONYA	4040
Calibration	FISCHER, HOWARD	4029
Calibration	FOSTER, HAROLD	4038
Calibration	GARCIA, MICHEAL	4014
Calibration	GRAY, SHAWN	4013
Calibration	HAYS, ANGELINA	4034
Calibration	HEBERT, FRANCISCO	4037
Calibration	HOLDEN, ANTHONY	4012
Calibration	HOOPER, LARRY	4007
Calibration	HORN, ERIK	4020
Calibration	JENNINGS, TABITHA	4035

QA Reporting

Overview of QA Reports

The cc: Discover QA Reports allow you to trend and track the Quality Assurance performance of your agent, analysts, and groups. The various QA reports give you insight into QA critical areas such as calibration, trending, and team performance. The QA report also serve as an extremely powerful coaching tool to help close knowledge gaps, as identified through the evaluation of call and shown through reporting.

QA Reporting is based on the evaluations that your Quality Assurance (QA) Team have performed. These reports require that a QA form be created in cc: Discover using the Form Creator in the Coaching tab, under the Quality Assurance Area. The way that your form is created affects and impacts the reporting data that you are able to see in the QA focused reports.

Quality Assurance

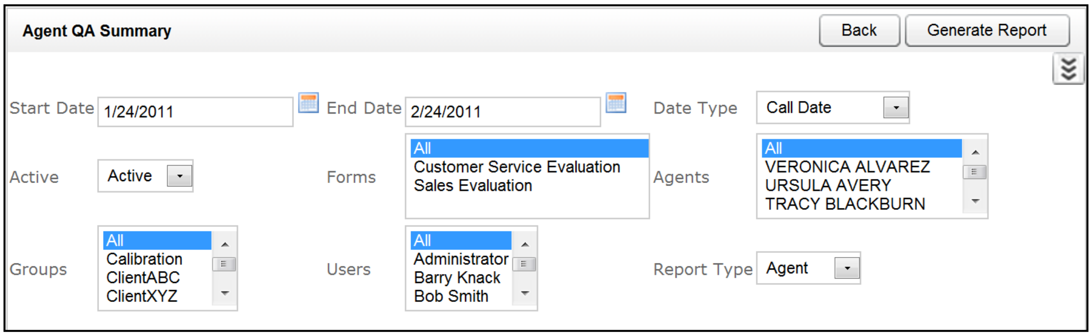
Filter: Search

Report	Description	Date Created
Agent QA Summary	Quality Assurance Summary By Agent	3/1/2011
Agent Ranking By Period	Agent Ranking by Period	3/1/2011
Agents Needing Evaluation Detail	Filtered list of when each evaluator has last evaluated each agent on each form.	3/1/2011
Agents Needing Evaluation Summary	Shows the last time an agent has been evaluated for the given criteria.	3/1/2011
Blank QA Form	Print out blank quality assurance forms for off line evaluations.	3/1/2011
Call Evaluation Detail	Full details of the QA evaluation and the evaluated call. For performance reasons, limited to first 500 records meeting criteria.	3/1/2011
Completed QA Form	Review or print out complete quality assurance evaluations.	3/1/2011
Critical Question Detail	Detail of performance on critical questions.	3/1/2011
Critical Question Summary	Summary of performance on critical questions by agent or group.	3/1/2011
Evaluator QA Summary	Evaluator Calibration Report	3/1/2011
Form and Section Failures Report	Displays the list of calls which were evaluated to contain a response that indicated a failure at a section or form level.	3/1/2011
Group QA Summary	Quality Assurance Summary By Group	3/1/2011
Group Summary By Month	Group performance trend over monthly intervals.	3/1/2011
Group Summary By Period	Group performance trend over time with selectable intervals.	3/1/2011
Multiple Evaluations Summary	Comparison of the prior twelve evaluations of an agent on a particular form.	3/1/2011
QA Agent Periodical Trending Report	This specialized trending report makes it easy to compare the performance of groups in different sections of a QA form over time.	3/1/2011
QA Agent Trending Report	Trending reports allow you to read across the data to see changes over time. The QA agent trending report breaks down scores by agent and allows you to easy compare the performance of an agent in different sections or on different questions.	3/1/2011
QA Calibration Trending Report	Trending reports allow you to read across the data to see changes over time. The QA calibration trending report breaks down scores by QA evaluator and allows you to easily compare the performance of a user in different sections or on different questions.	3/1/2011
QA Form Trending Report	Trending reports allow you to read across the data to see changes over time. The QA form trending report breaks down scores by form or form component, and may further break them down by subgroup for easy comparison.	3/1/2011
QA Group Periodical Trending Report	This specialized trending report makes it easy to compare the performance of groups in different sections of a QA form over time.	3/1/2011

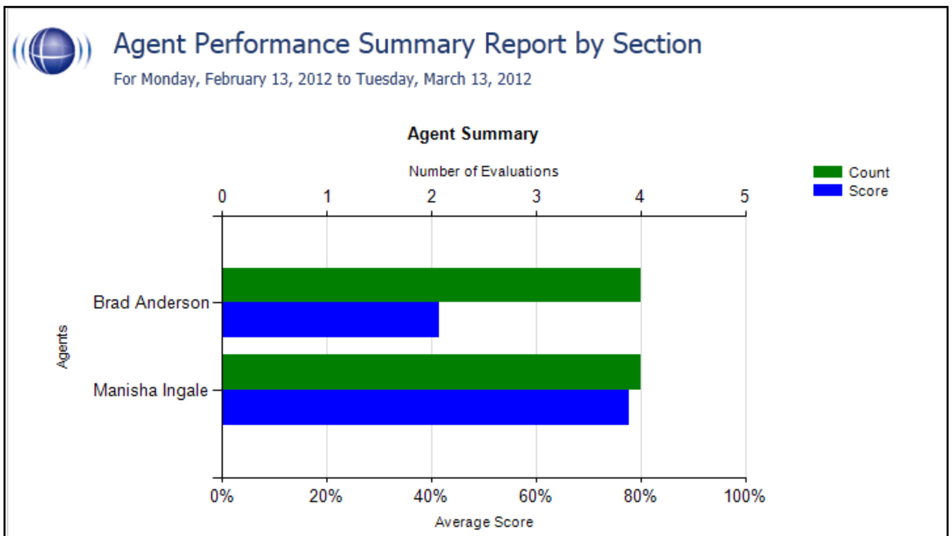
Pages : 1 2 > >> Go To Page : 1 of 2 Go

Agent QA Summary

This report displays the selected Group(s) or Agent(s) Quality Assurance (QA) performance over a period of time. The Report Type criteria specify a level of detail: Agent, Form, Section, and Question. If the report is used in cc: Discover, users can drill-down to lower levels of detail.



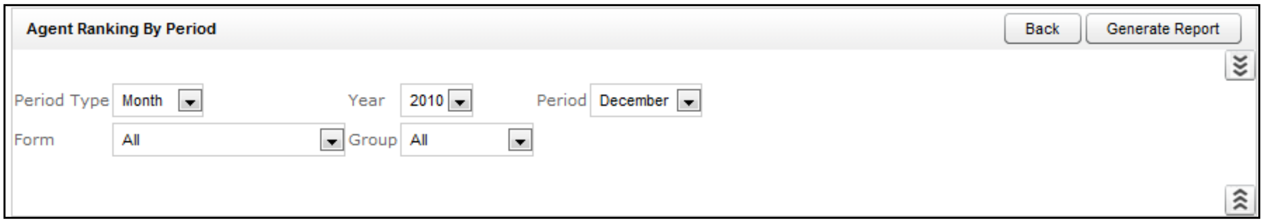
In the example below, the Report Type was set to Section, and a user can drill down to Question level results by clicking a section label. The report results returned are limited to groups with which the logged-in user shares a role.



Agent	# Evaluations	Score	Possible	Percentage
Brad Anderson	4	645	1559	41.4%
Customer 1 Evaluation	1	600	1490	40.3%
Section 1	1	150	490	30.6%
Section 2	1	400	500	80.0%
Section 3	1	50	500	10.0%
Customer 2 Evaluation	1	35	35	100.0%
s1	1	30	30	100.0%
s2	1	5	5	100.0%
Summer Sales Evaluation	1	5	9	55.6%
Section 1	1	5	9	55.6%
Finance Customer Evaluation	1	5	25	20.0%
s1	1	5	25	20.0%
s2	1	0	0	N/A

Agent Ranking by Period

This report compares your Agent's QA performance from one time period to another: week to week, month to month, quarter to quarter, or year to year. The last column in the report ranks the Agents in your system from 1 – X and show their positive trending with a green arrow and negative trending with a red arrow. The report results returned are limited to groups with which the logged-in user shares a role.



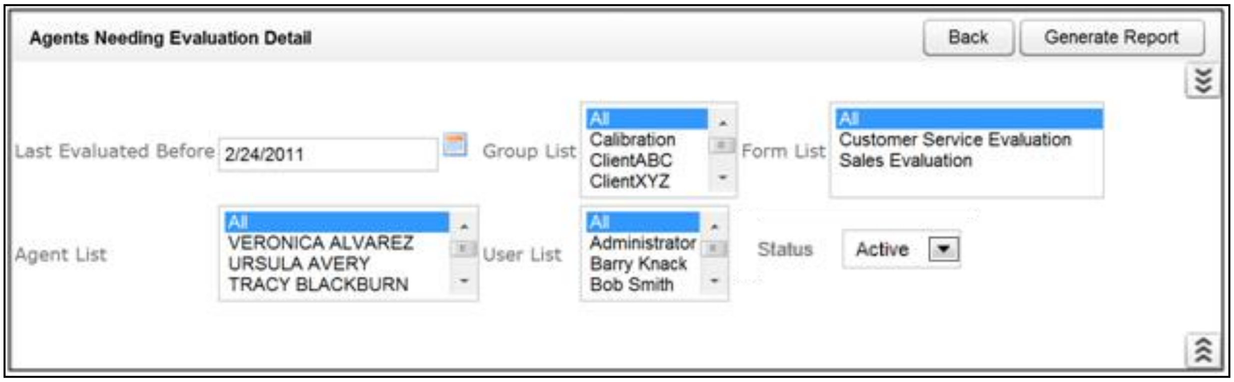
Agent Ranking by Month

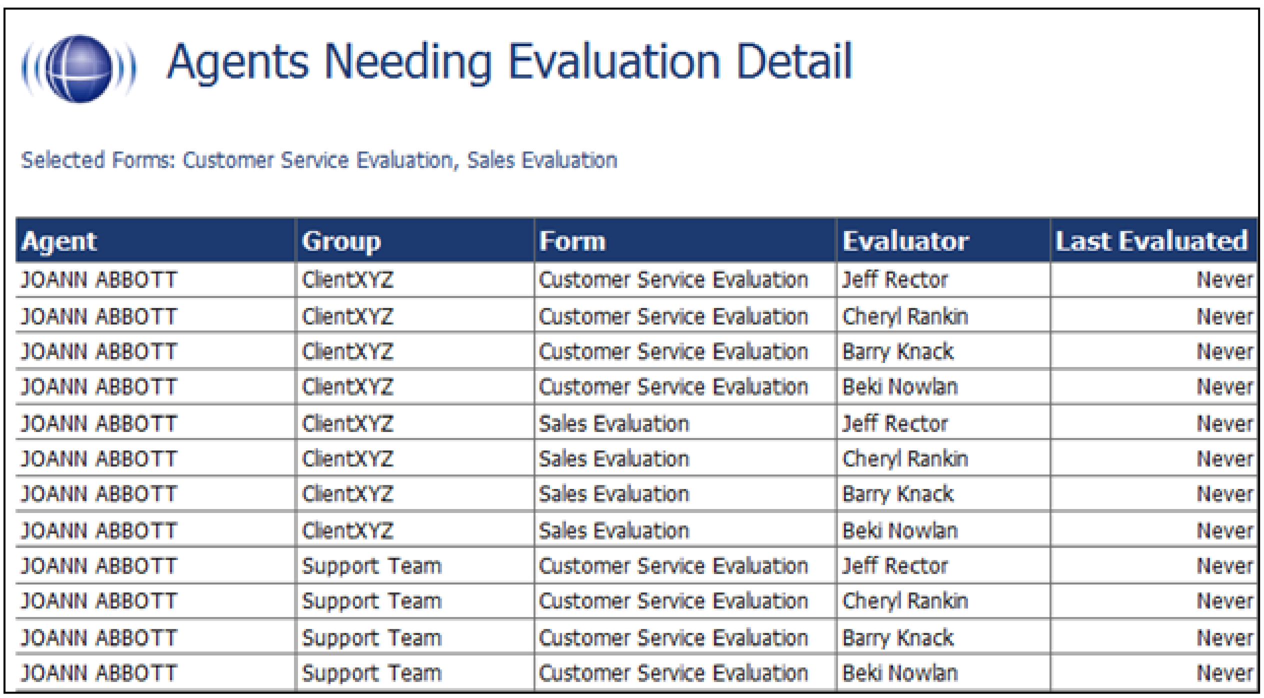
For period beginning 12/1/2010 and ending 12/31/2010

Agent Name	Selected Month Score	Prior Month Score	Rank	
JIMENEZ, JUNE	1307 of 1355 (96.5%)	3538 of 3970 (89.1%)	1 (+36)	↑
FISCHER, HOWARD	1287 of 1335 (96.4%)	5428 of 5820 (93.3%)	2 (+6)	↑
DELACRUZ, BARRY	1831 of 1935 (94.6%)	3875 of 4195 (92.4%)	3 (+8)	↑
PECK, LUPE	1333 of 1420 (93.9%)	3383 of 3720 (90.9%)	4 (+24)	↑
BELL, ESTER	1067 of 1140 (93.6%)	3481 of 3840 (90.7%)	5 (+26)	↑
HOOPER, LARRY	995 of 1065 (93.4%)	3226 of 3495 (92.3%)	6 (+7)	↑
JONES, MARVIN	984 of 1055 (93.3%)	3388 of 3685 (91.9%)	7 (+10)	↑
HORN, ERIK	1804 of 1935 (93.2%)	4159 of 4495 (92.5%)	8 (+2)	↑
ASHLEY, RUBEN	1981 of 2140 (92.6%)	1948 of 2205 (88.3%)	9 (+29)	↑
SOLOMON, DUANE	784 of 850 (92.2%)	2892 of 3065 (94.4%)	10 (-8)	↓
BAUER, ALBERT	2361 of 2560 (92.2%)	3857 of 4290 (89.9%)	11 (+22)	↑
HOLDEN, ANTHONY	1516 of 1645 (92.2%)	4423 of 4860 (91%)	12 (+14)	↑
JENNINGS, TABITHA	1854 of 2020 (91.8%)	4114 of 4365 (94.2%)	13 (-10)	↓
SLOAN, SHAWN	2286 of 2515 (90.9%)	2802 of 2990 (93.7%)	14 (-9)	↓
EWING, WILLA	2511 of 2765 (90.8%)	4700 of 5095 (92.2%)	15 (0)	↑
SAMPSON, THERESA	3561 of 3925 (90.7%)	3265 of 3580 (91.2%)	16 (+9)	↑
FOSTER, HAROLD	771 of 850 (90.7%)	3061 of 3430 (89.2%)	17 (+18)	↑
OCHOA, YOUNG	906 of 1000 (90.6%)	4406 of 4860 (90.7%)	18 (+12)	↑
CANTRELL, MADELEINE	1286 of 1420 (90.6%)	3435 of 3720 (92.3%)	19 (-7)	↓
FARRELL, HALEY	2100 of 2325 (90.3%)	4098 of 4505 (91%)	20 (+7)	↑

Agents Needing Evaluation Detail

This report displays the last time selected active, inactive, or all Agent(s) were scored on a particular form, based on the Group(s) they are assigned to and the User (Evaluator) who last completed the QA evaluation. The report shows all the groups of which an agent is a member. The report results returned are limited to groups with which the logged-in user shares a role.





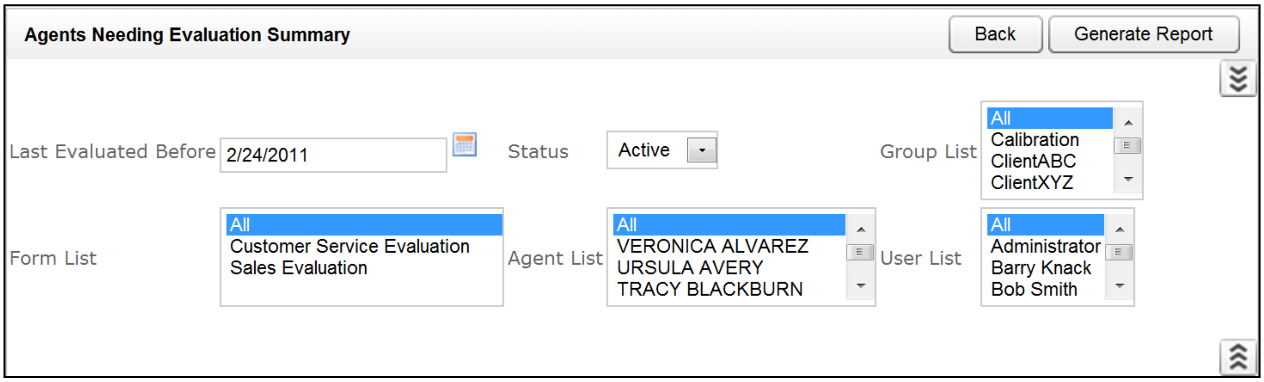
Agents Needing Evaluation Detail

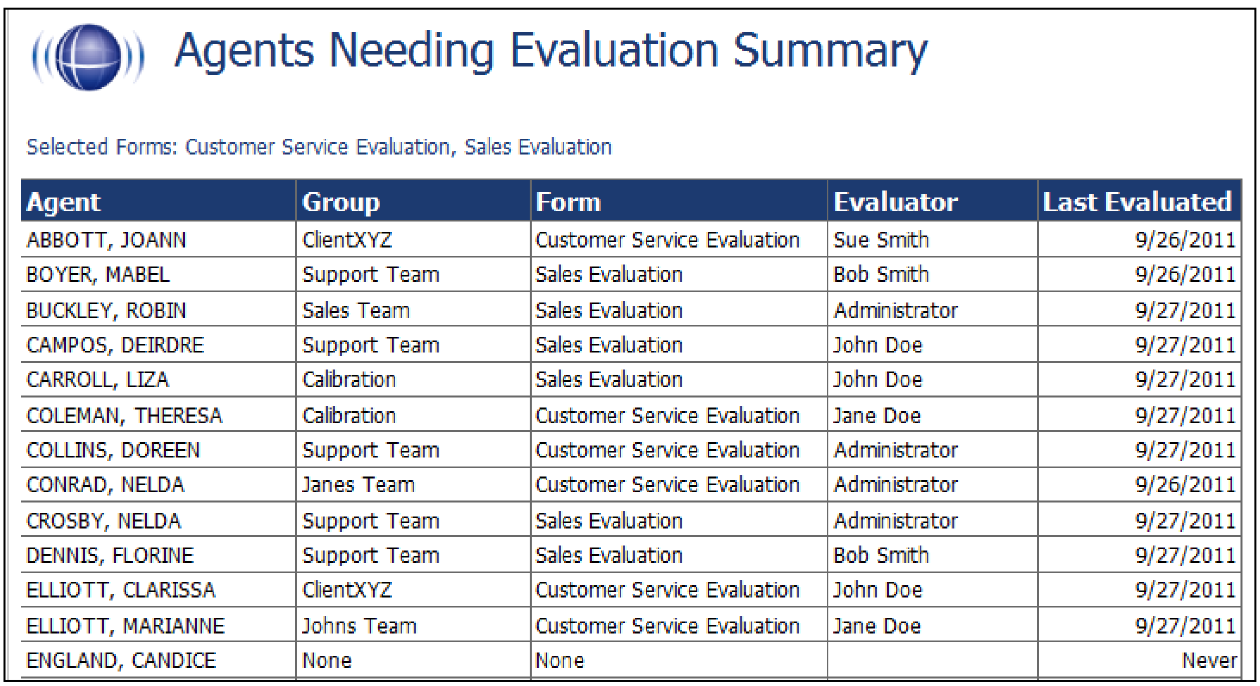
Selected Forms: Customer Service Evaluation, Sales Evaluation

Agent	Group	Form	Evaluator	Last Evaluated
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Jeff Rector	Never
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Cheryl Rankin	Never
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Barry Knack	Never
JOANN ABBOTT	ClientXYZ	Customer Service Evaluation	Beki Nowlan	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Jeff Rector	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Cheryl Rankin	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Barry Knack	Never
JOANN ABBOTT	ClientXYZ	Sales Evaluation	Beki Nowlan	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Jeff Rector	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Cheryl Rankin	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Barry Knack	Never
JOANN ABBOTT	Support Team	Customer Service Evaluation	Beki Nowlan	Never

Agents Needing Evaluation Summary

This report displays the last time an Agent was evaluated, by any Evaluator, from a selected end time. The Evaluation Summary report only shows one entry for per agent, regardless of how many groups of which they are a member.





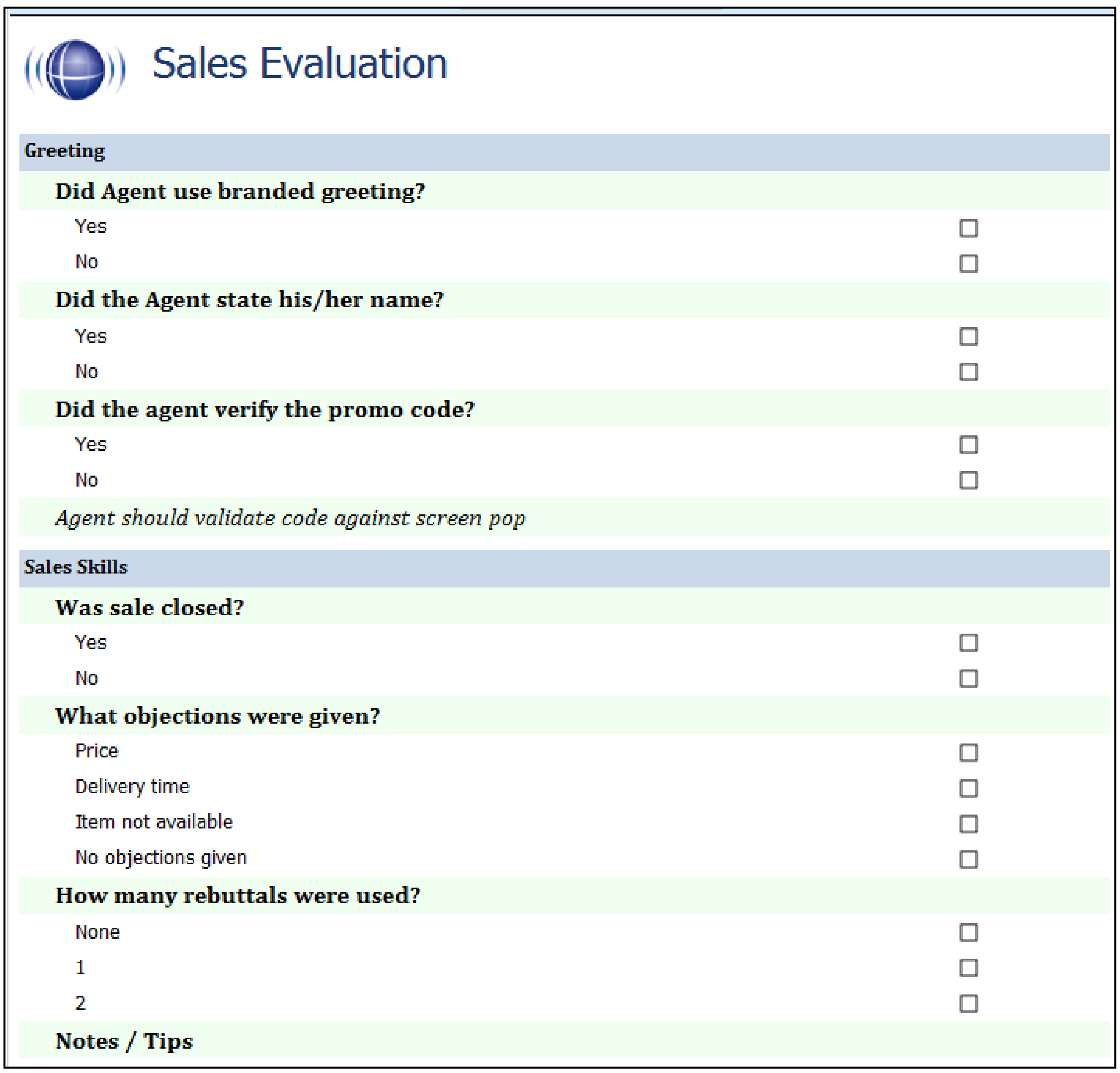
Agents Needing Evaluation Summary

Selected Forms: Customer Service Evaluation, Sales Evaluation

Agent	Group	Form	Evaluator	Last Evaluated
ABBOTT, JOANN	ClientXYZ	Customer Service Evaluation	Sue Smith	9/26/2011
BOYER, MABEL	Support Team	Sales Evaluation	Bob Smith	9/26/2011
BUCKLEY, ROBIN	Sales Team	Sales Evaluation	Administrator	9/27/2011
CAMPOS, DEIRDRE	Support Team	Sales Evaluation	John Doe	9/27/2011
CARROLL, LIZA	Calibration	Sales Evaluation	John Doe	9/27/2011
COLEMAN, THERESA	Calibration	Customer Service Evaluation	Jane Doe	9/27/2011
COLLINS, DOREEN	Support Team	Customer Service Evaluation	Administrator	9/27/2011
CONRAD, NELDA	Janes Team	Customer Service Evaluation	Administrator	9/26/2011
CROSBY, NELDA	Support Team	Sales Evaluation	Administrator	9/27/2011
DENNIS, FLORINE	Support Team	Sales Evaluation	Bob Smith	9/27/2011
ELLIOTT, CLARISSA	ClientXYZ	Customer Service Evaluation	John Doe	9/27/2011
ELLIOTT, MARIANNE	Johns Team	Customer Service Evaluation	Jane Doe	9/27/2011
ENGLAND, CANDICE	None	None		Never

Blank QA Form

This report displays a blank version of a specific Quality Assurance form that has been created in the cc: Discover system. The report results returned are limited to groups with which the logged-in user shares a role.



Sales Evaluation

Greeting

Did Agent use branded greeting?

Yes ☐
No ☐

Did the Agent state his/her name?

Yes ☐
No ☐

Did the agent verify the promo code?

Yes ☐
No ☐

Agent should validate code against screen pop

Sales Skills

Was sale closed?

Yes ☐
No ☐

What objections were given?

Price ☐
Delivery time ☐
Item not available ☐
No objections given ☐

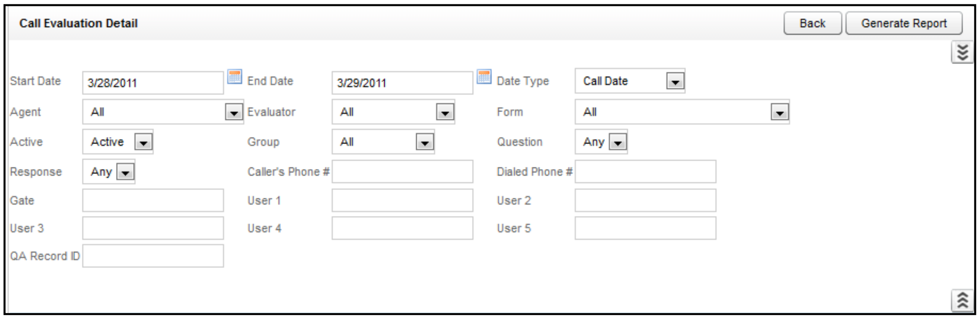
How many rebuttals were used?

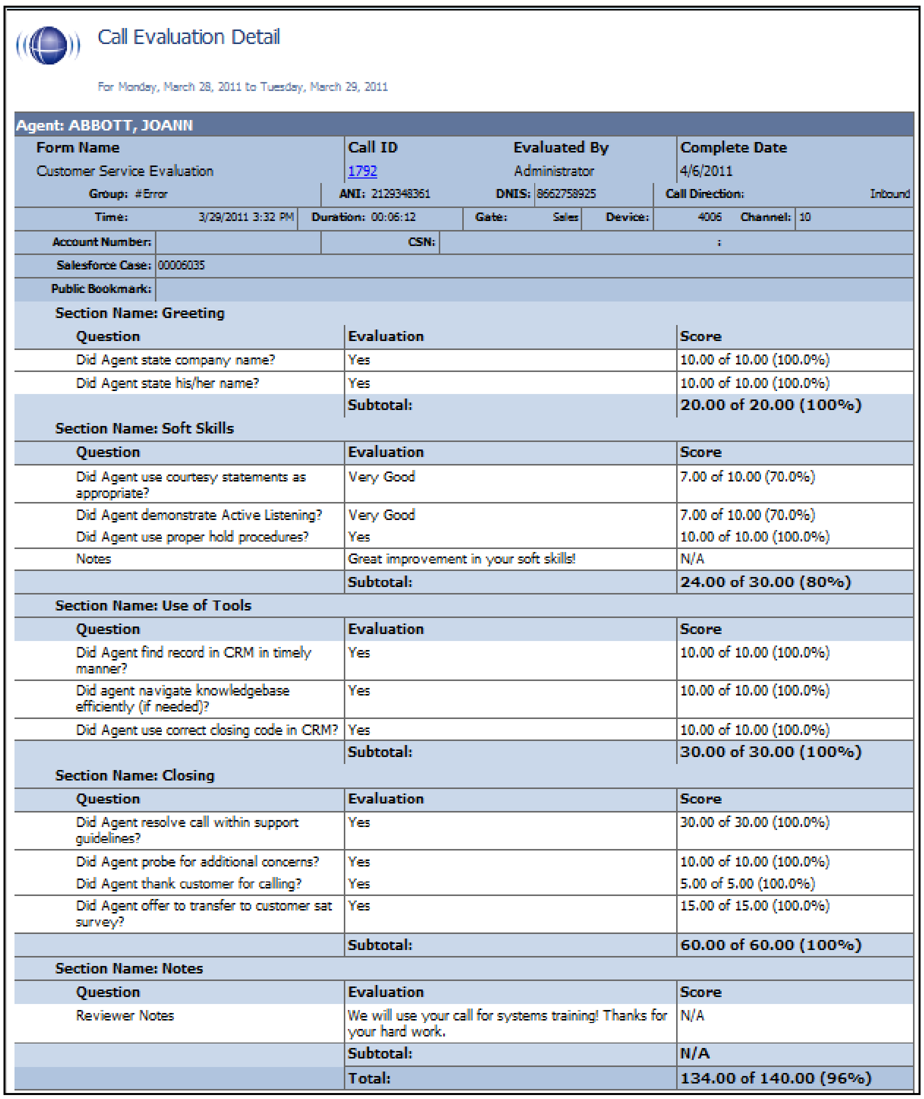
None ☐
1 ☐
2 ☐

Notes / Tips

Call Evaluation Detail

This report shows the detailed results on a completed evaluation based on your selection criteria. The data is broken down by metadata information at the top and then a section and question level breakdown of the form, complete with individual responses. The report results returned are limited to groups with which the logged-in user shares a role.




Call Evaluation Detail

For Monday, March 28, 2011 to Tuesday, March 29, 2011

Agent: ABBOTT, JOANN

Form Name	Call ID	Evaluated By	Complete Date
Customer Service Evaluation	1792	Administrator	4/6/2011

Group:	#Error	ANI:	2129348361	DNIS:	8662758925	Call Direction:	Inbound
Time:	3/29/2011 3:32 PM	Duration:	00:06:12	Gate:	Sales	Device:	4006 Channel: 10
Account Number:		CSN:		:			
Salesforce Case:	00006035						
Public Bookmark:							

Question	Evaluation	Score
Section Name: Greeting		
Did Agent state company name?	Yes	10.00 of 10.00 (100.0%)
Did Agent state his/her name?	Yes	10.00 of 10.00 (100.0%)
	Subtotal:	**20.00 of 20.00 (100%)**
Section Name: Soft Skills		
Did Agent use courtesy statements as appropriate?	Very Good	7.00 of 10.00 (70.0%)
Did Agent demonstrate Active Listening?	Very Good	7.00 of 10.00 (70.0%)
Did Agent use proper hold procedures?	Yes	10.00 of 10.00 (100.0%)
Notes	Great improvement in your soft skills!	N/A
	Subtotal:	**24.00 of 30.00 (80%)**
Section Name: Use of Tools		
Did Agent find record in CRM in timely manner?	Yes	10.00 of 10.00 (100.0%)
Did agent navigate knowledgebase efficiently (if needed)?	Yes	10.00 of 10.00 (100.0%)
Did Agent use correct closing code in CRM?	Yes	10.00 of 10.00 (100.0%)
	Subtotal:	**30.00 of 30.00 (100%)**
Section Name: Closing		
Did Agent resolve call within support guidelines?	Yes	30.00 of 30.00 (100.0%)
Did Agent probe for additional concerns?	Yes	10.00 of 10.00 (100.0%)
Did Agent thank customer for calling?	Yes	5.00 of 5.00 (100.0%)
Did Agent offer to transfer to customer sat survey?	Yes	15.00 of 15.00 (100.0%)
	Subtotal:	**60.00 of 60.00 (100%)**
Section Name: Notes		
Reviewer Notes	We will use your call for systems training! Thanks for your hard work.	N/A
	Subtotal:	**N/A**
	Total:	**134.00 of 140.00 (96%)**

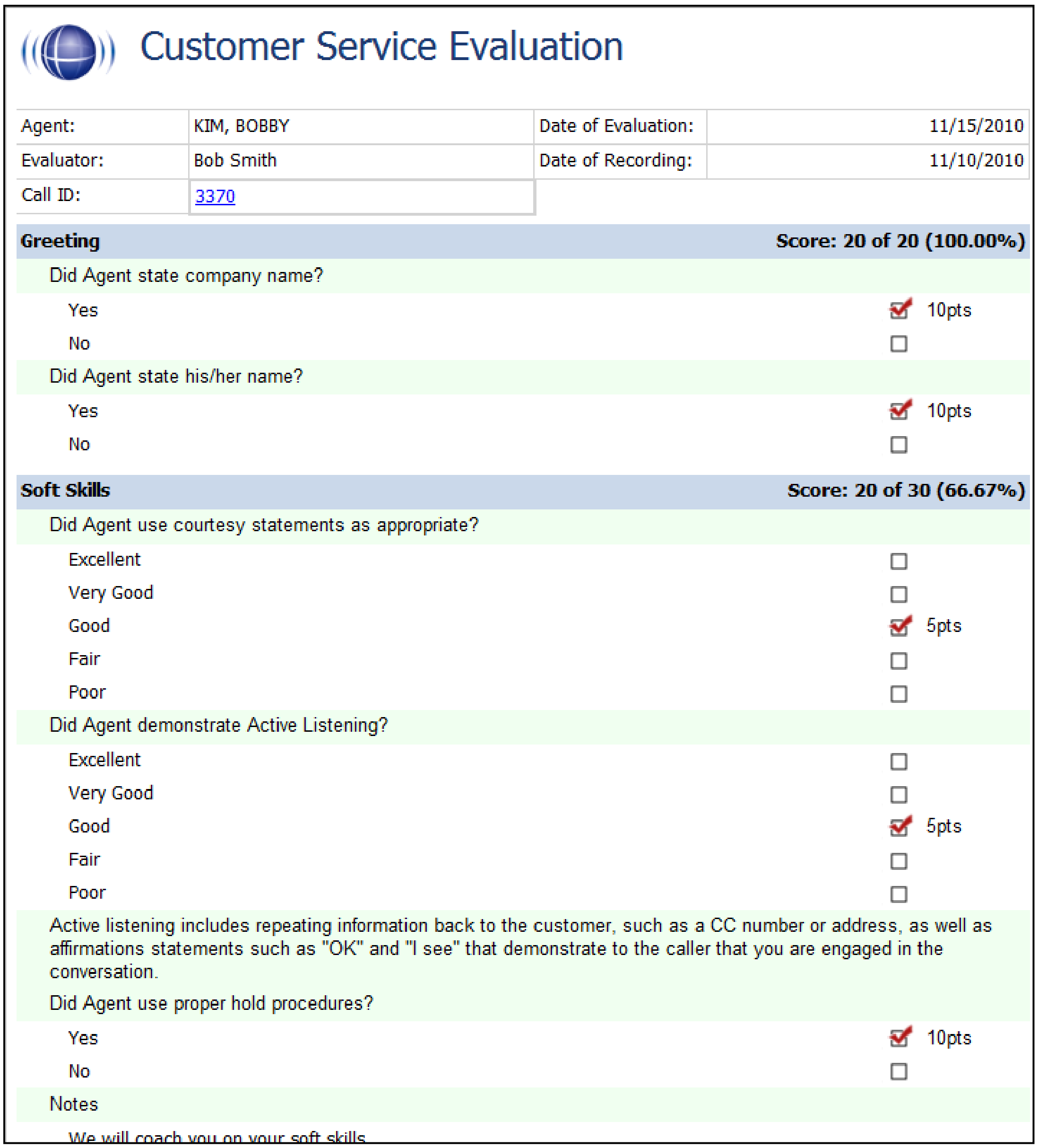
Completed QA Form

This report displays the scoring data for a specific QA evaluation. This report is automatically generated when the Print Report Button is pressed from the Search QA Evaluations link, located under the coaching tab, or by inputting the Record number, also located on the Search QA Evaluations page under the Coaching tab. The report results returned are limited to groups with which the logged-in user shares a role. All comments by agents, evaluators, and arbitrators appear at the bottom of the report.

Completed QA Form

Back | Generate Report

QA Record ID



Customer Service Evaluation

Agent:	KIM, BOBBY	Date of Evaluation:	11/15/2010
Evaluator:	Bob Smith	Date of Recording:	11/10/2010
Call ID:	3370		

Greeting — **Score: 20 of 20 (100.00%)**

Did Agent state company name?

- Yes ☑ 10pts
- No ☐

Did Agent state his/her name?

- Yes ☑ 10pts
- No ☐

Soft Skills — **Score: 20 of 30 (66.67%)**

Did Agent use courtesy statements as appropriate?

- Excellent ☐
- Very Good ☐
- Good ☑ 5pts
- Fair ☐
- Poor ☐

Did Agent demonstrate Active Listening?

- Excellent ☐
- Very Good ☐
- Good ☑ 5pts
- Fair ☐
- Poor ☐

Active listening includes repeating information back to the customer, such as a CC number or address, as well as affirmations statements such as "OK" and "I see" that demonstrate to the caller that you are engaged in the conversation.

Did Agent use proper hold procedures?

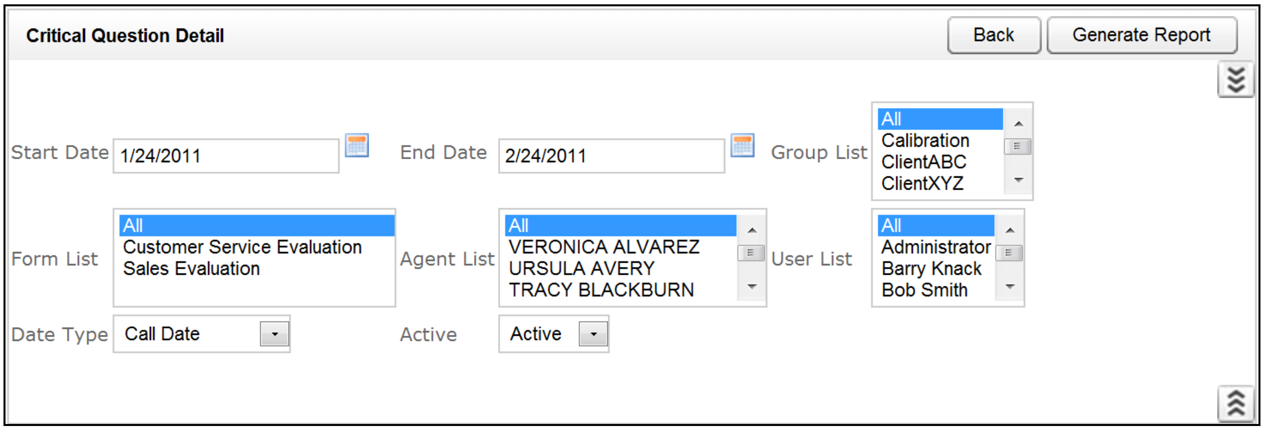
- Yes ☑ 10pts
- No ☐

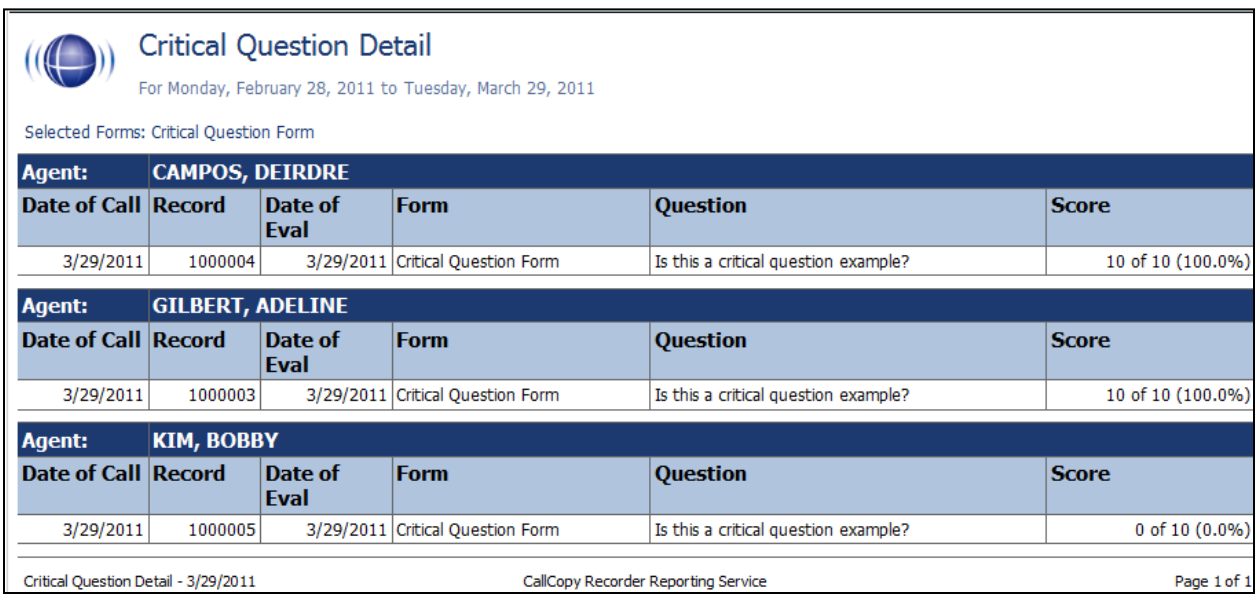
Notes

We will coach you on your soft skills

Critical Question Detail

This report allows you to see the detailed insight as to how each agent has scored on the Critical question on all evaluated calls. The report results returned are limited to groups with which the logged-in user shares a role.





Critical Question Detail

For Monday, February 28, 2011 to Tuesday, March 29, 2011

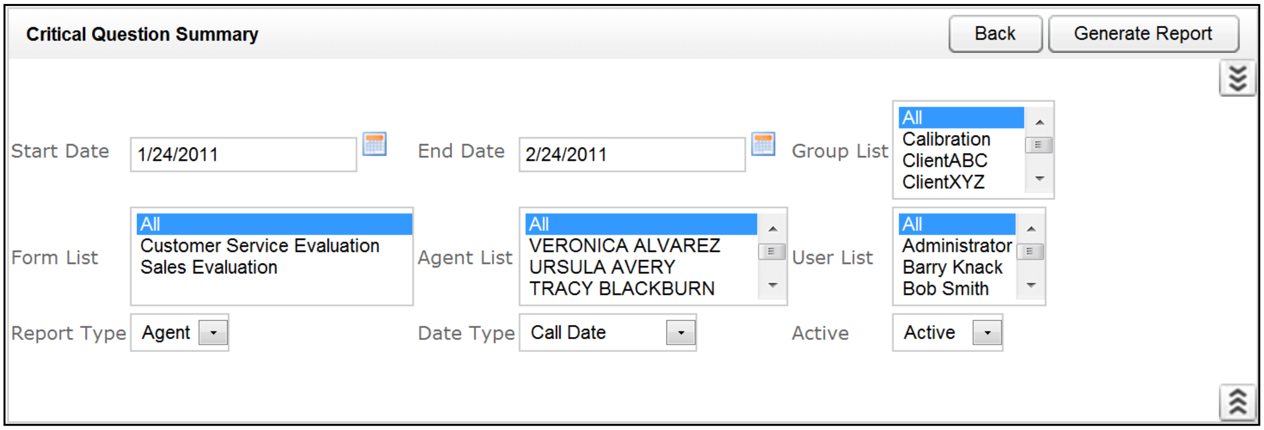
Selected Forms: Critical Question Form

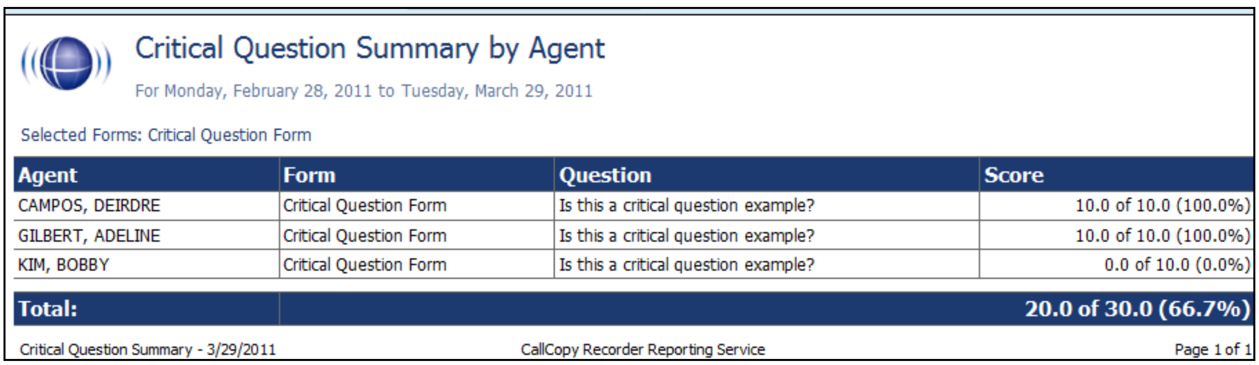
Agent:	CAMPOS, DEIRDRE				
Date of Call	Record	Date of Eval	Form	Question	Score
3/29/2011	1000004	3/29/2011	Critical Question Form	Is this a critical question example?	10 of 10 (100.0%)
Agent:	GILBERT, ADELINE				
Date of Call	Record	Date of Eval	Form	Question	Score
3/29/2011	1000003	3/29/2011	Critical Question Form	Is this a critical question example?	10 of 10 (100.0%)
Agent:	KIM, BOBBY				
Date of Call	Record	Date of Eval	Form	Question	Score
3/29/2011	1000005	3/29/2011	Critical Question Form	Is this a critical question example?	0 of 10 (0.0%)

Critical Question Detail - 3/29/2011 CallCopy Recorder Reporting Service Page 1 of 1

Critical Question Summary

This report shows the summary of the critical question as a whole. The report results returned are limited to groups with which the logged-in user shares a role.





Critical Question Summary by Agent

For Monday, February 28, 2011 to Tuesday, March 29, 2011

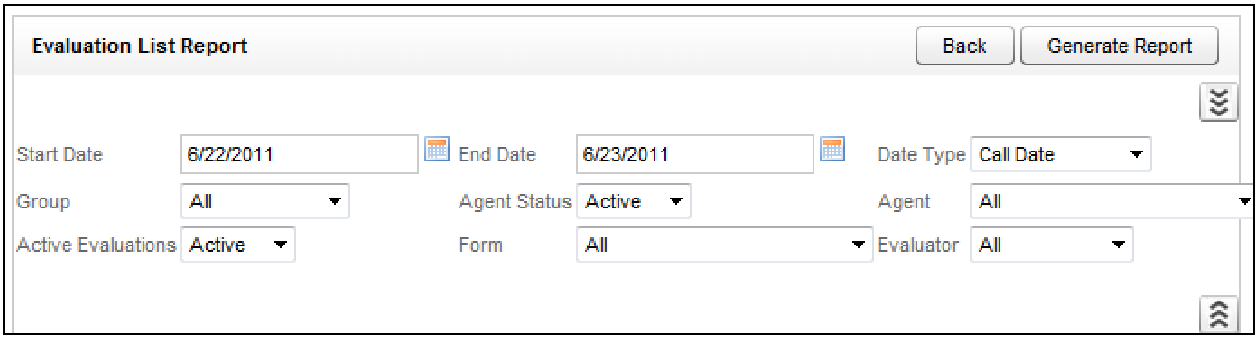
Selected Forms: Critical Question Form

Agent	Form	Question	Score
CAMPOS, DEIRDRE	Critical Question Form	Is this a critical question example?	10.0 of 10.0 (100.0%)
GILBERT, ADELINE	Critical Question Form	Is this a critical question example?	10.0 of 10.0 (100.0%)
KIM, BOBBY	Critical Question Form	Is this a critical question example?	0.0 of 10.0 (0.0%)
Total:			**20.0 of 30.0 (66.7%)**

Critical Question Summary - 3/29/2011 CallCopy Recorder Reporting Service Page 1 of 1

Evaluation List Report

This report generates a list of agent evaluations that were performed. This report provides a means of tracking the evaluation process and the scoring of evaluations. The report results returned are limited to groups with which the logged-in user shares a role.

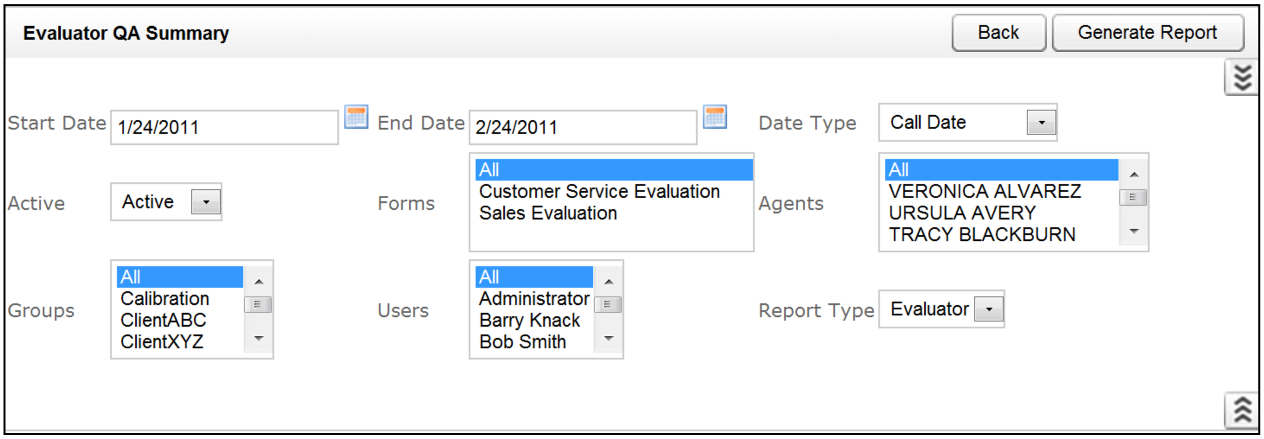


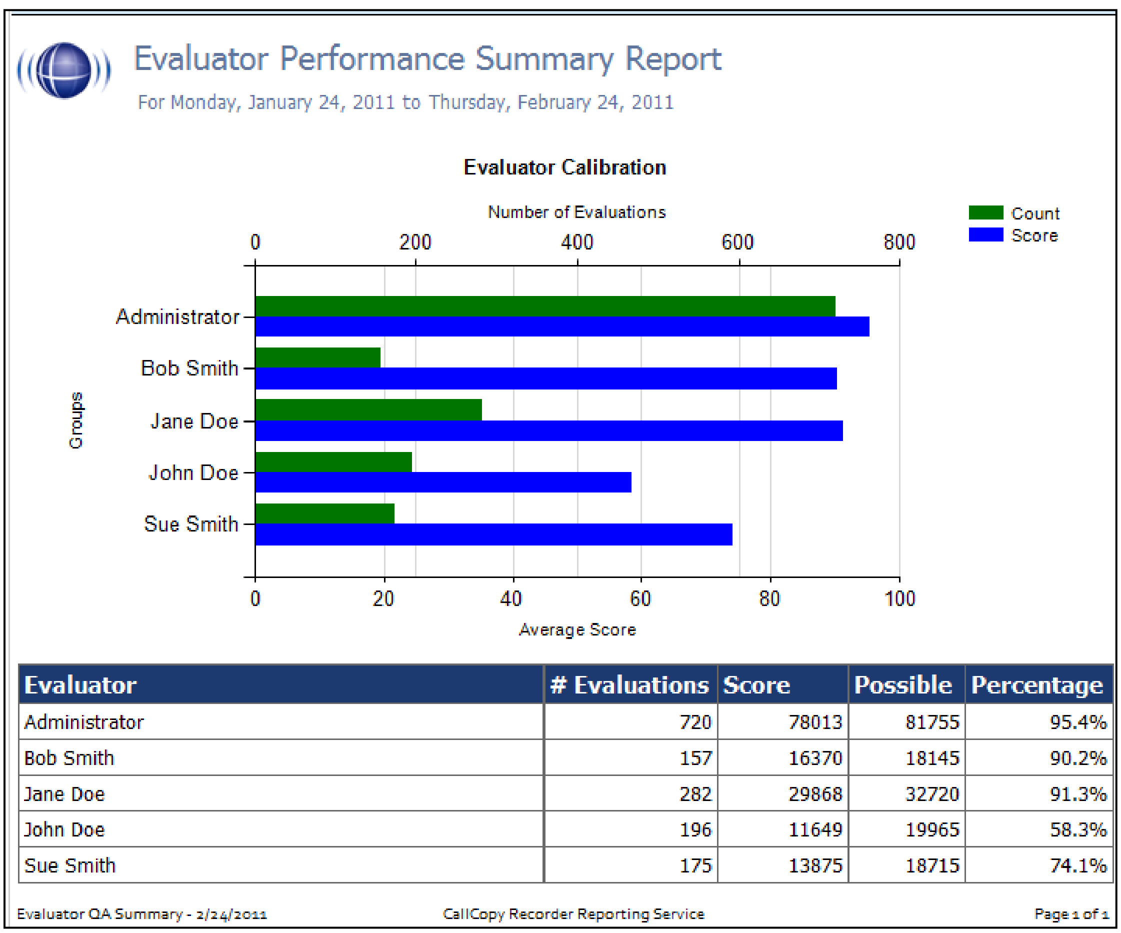
Quality Assurance Evaluation List

Form	Agent	Record ID	Recording Date	Evaluated By	Evaluation Date	Score
Customer Service Evaluation	ANTHONY, LAWANDA	5742	06/22/11	Administrator	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	ANTHONY, LAWANDA	6225	06/23/11	Administrator	06/23/2011	134.0 of 140.0 (95.7%)
Customer Service Evaluation	ANTHONY, LAWANDA	12436	06/23/11	Jane Doe	06/23/2011	120.0 of 140.0 (85.7%)
Customer Service Evaluation	AYALA, JEFFERY	25950	06/22/11	Bob Smith	06/22/2011	120.0 of 140.0 (85.7%)
Customer Service Evaluation	BARRETT, WHITNEY	21438	06/22/11	Administrator	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	BARRETT, WHITNEY	21439	06/22/11	Administrator	06/22/2011	134.0 of 140.0 (95.7%)
Customer Service Evaluation	CLARK, DOMINIQUE	22821	06/22/11	Bob Smith	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	CLARK, DOMINIQUE	22822	06/22/11	Administrator	06/22/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	CONTRERAS, KRISTINE	5119	06/23/11	Administrator	06/23/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	CONTRERAS, KRISTINE	11697	06/23/11	Jane Doe	06/23/2011	140.0 of 140.0 (100.0%)
Customer Service Evaluation	DANIEL, OFELIA	14372	06/22/11	Bob Smith	06/22/2011	134.0 of 140.0 (95.7%)

Evaluator QA Summary

This report displays the results of your evaluator's QA performance over a selected period of time. It can be used to calibrate evaluator's scoring practices to ensure consistent and fair scoring. The initially generated report is a high level comparison, but it can be drilled-down into for more granular detail. The report results returned are limited to groups with which the logged-in user shares a role.





Evaluator Performance Summary Report

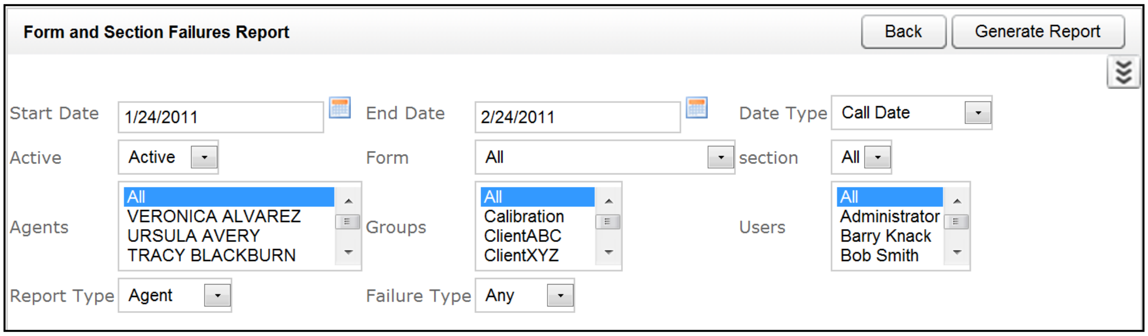
For Monday, January 24, 2011 to Thursday, February 24, 2011

Evaluator	# Evaluations	Score	Possible	Percentage
Administrator	720	78013	81755	95.4%
Bob Smith	157	16370	18145	90.2%
Jane Doe	282	29868	32720	91.3%
John Doe	196	11649	19965	58.3%
Sue Smith	175	13875	18715	74.1%

Evaluator QA Summary - 2/24/2011 CallCopy Recorder Reporting Service Page 1 of 1

Form and Section Failures Report

This report displays the critical failure points in a form(s) over a selected period of time. The top section will show a summary, indicating the total number of form and/or section failure per agent; while the lower section supplies the detail of the failure. The report results returned are limited to groups with which the logged-in user shares a role.



Form and Section Failure Report by Agent

For Monday, January 24, 2011 to Thursday, February 24, 2011

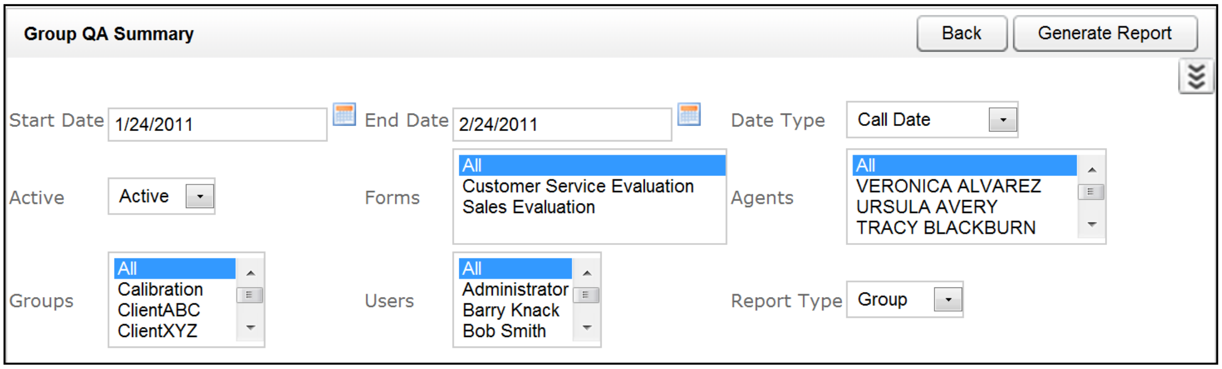
Selected Groups: ClientXYZ

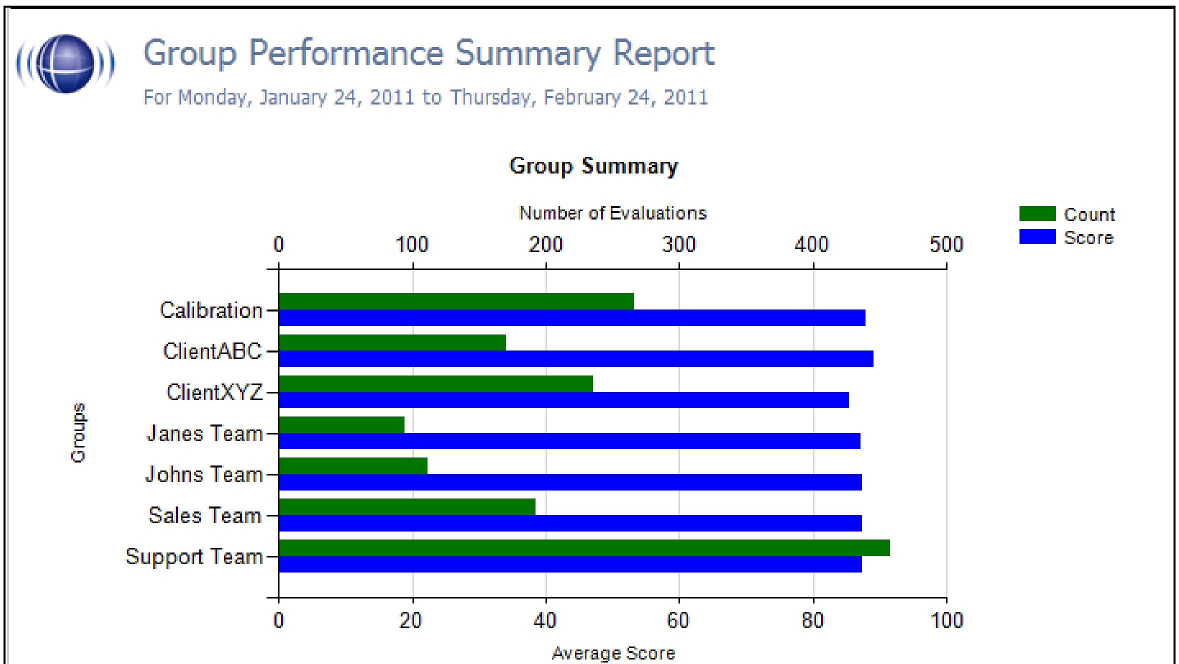
Customer Service Evaluation		Greeting
Agent		**Failure Count**
HICKMAN, RONALD		Form Failures: 0, Section Failures: 1
PATTERSON, GRETA		Form Failures: 0, Section Failures: 1
REEVES, CECILIA		Form Failures: 0, Section Failures: 1
SELLERS, ELLA		Form Failures: 0, Section Failures: 1
SHEPHERD, LETHA		Form Failures: 0, Section Failures: 1
TUCKER, SUSAN		Form Failures: 0, Section Failures: 1
	Total:	**Form Failures: 0, Section Failures: 6**

Form	Section	Agent	Failure	Call ID	Date
Customer Service Evaluation	Greeting	HICKMAN, RONALD	Section	2237	2/4/2011
HICKMAN, RONALD	**Total:**	**Form Failures: 0, Section Failures: 1**			
Customer Service Evaluation	Greeting	PATTERSON, GRETA	Section	5749	1/27/2011
PATTERSON, GRETA	**Total:**	**Form Failures: 0, Section Failures: 1**			
Customer Service Evaluation	Greeting	REEVES, CECILIA	Section	9716	2/23/2011
REEVES, CECILIA	**Total:**	**Form Failures: 0, Section Failures: 1**			
Customer Service Evaluation	Greeting	SELLERS, ELLA	Section	3181	2/16/2011
SELLERS, ELLA	**Total:**	**Form Failures: 0, Section Failures: 1**			
Customer Service Evaluation	Greeting	SHEPHERD, LETHA	Section	8832	2/18/2011
SHEPHERD, LETHA	**Total:**	**Form Failures: 0, Section Failures: 1**			
Customer Service Evaluation	Greeting	TUCKER, SUSAN	Section	508	2/22/2011
TUCKER, SUSAN	**Total:**	**Form Failures: 0, Section Failures: 1**			
Greeting	**Total:**	**Form Failures: 0, Section Failures: 6**			

Group QA Summary

This report displays the performance of a selected team(s) on a form(s) over a period of time, for quick and easy comparison. This report enables drill-down for more granular data on Report Type (Group, Form, Section, and Question). The report results returned are limited to groups with which the logged-in user shares a role.



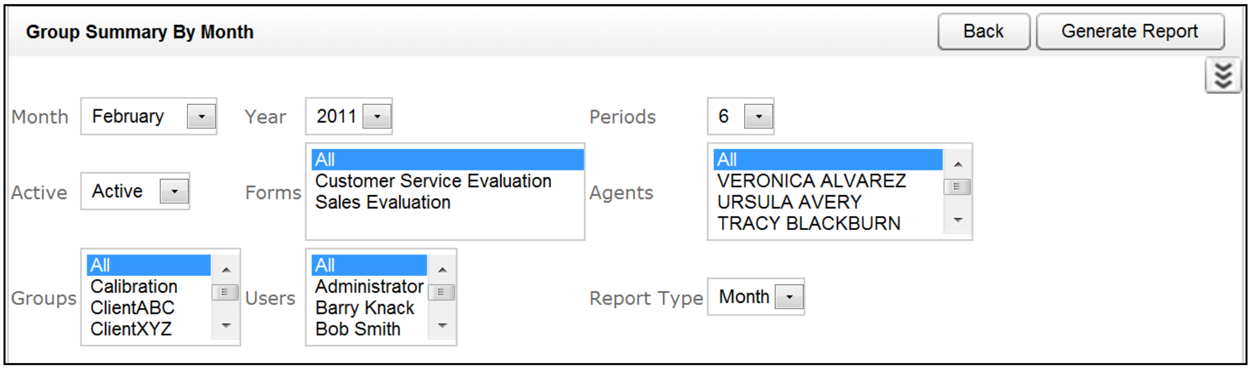


Group	# Evaluations	Score	Possible	Percentage
Calibration	267	26366	29970	88.0%
ClientABC	171	16925	19000	89.1%
ClientXYZ	236	23094	26995	85.5%
Janes Team	94	8631	9910	87.1%
Johns Team	111	10633	12160	87.4%
Sales Team	193	19022	21755	87.4%
Support Team	458	45104	51510	87.6%

Group QA Summary - 2/24/2011 CallCopy Recorder Reporting Service Page 1 of 1

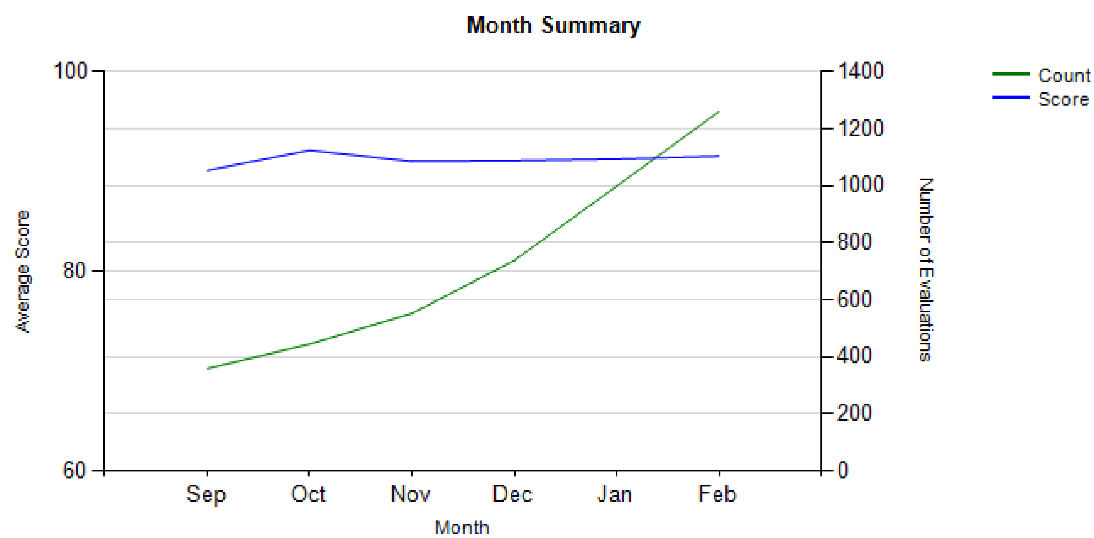
Group Summary by Month

This report displays the performance of a selected team(s) on a form(s), charted over a certain number of months based on your selection of a targeted end month. Report Type of Month shows data only by month. Report Type of Group shows evaluation data by group for each month. The report results returned are limited to groups with which the logged-in user shares a role.



Group Performance Summary Report by Month

For the period beginning 8/1/2010 and ending 2/28/2011

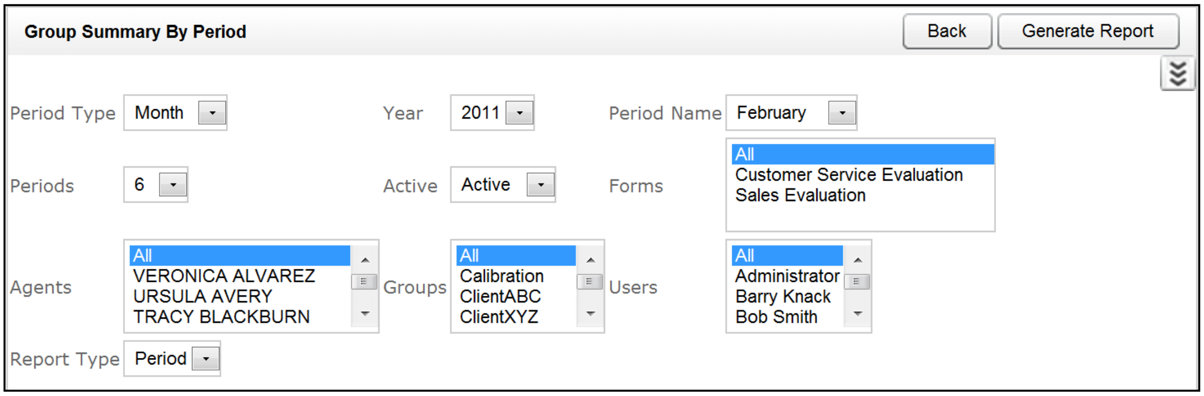


Month	# Evaluations	Score	Possible Score	Percentage
September	358	36560	40565	90.1%
October	444	47096	51110	92.1%
November	552	57454	63110	91.0%
December	738	75126	82455	91.1%
January	999	102264	112040	91.3%
February	1261	128843	140725	91.6%

Group Summary By Month - 2/24/2011 CallCopy Recorder Reporting Service Page 1 of 1

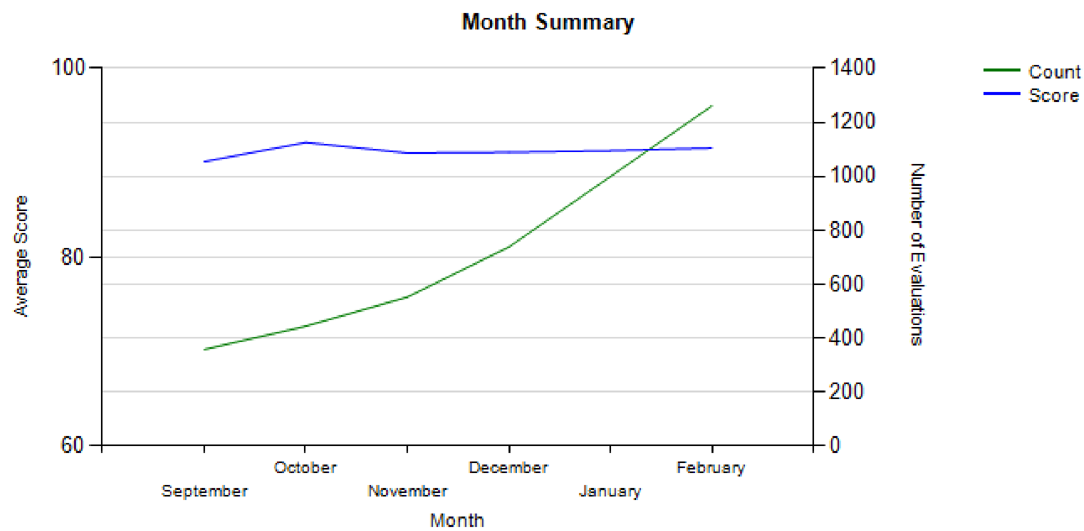
Group Summary by Period

This report displays the performance of a selected team(s) on a form(s), charted over a certain number of periods (week, month, quarter, or year) based on your selection of a targeted end period. The Period Name field specifies a starting point and the number of periods goes back from it. The report results returned are limited to groups with which the logged-in user shares a role.



Group Performance Summary Report by Month

For the period beginning 8/1/2010 and ending 2/28/2011

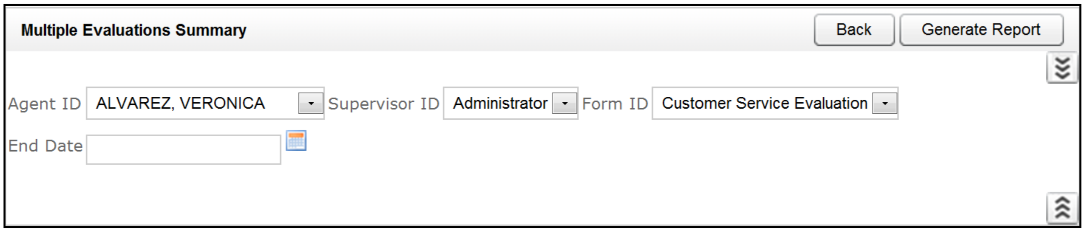


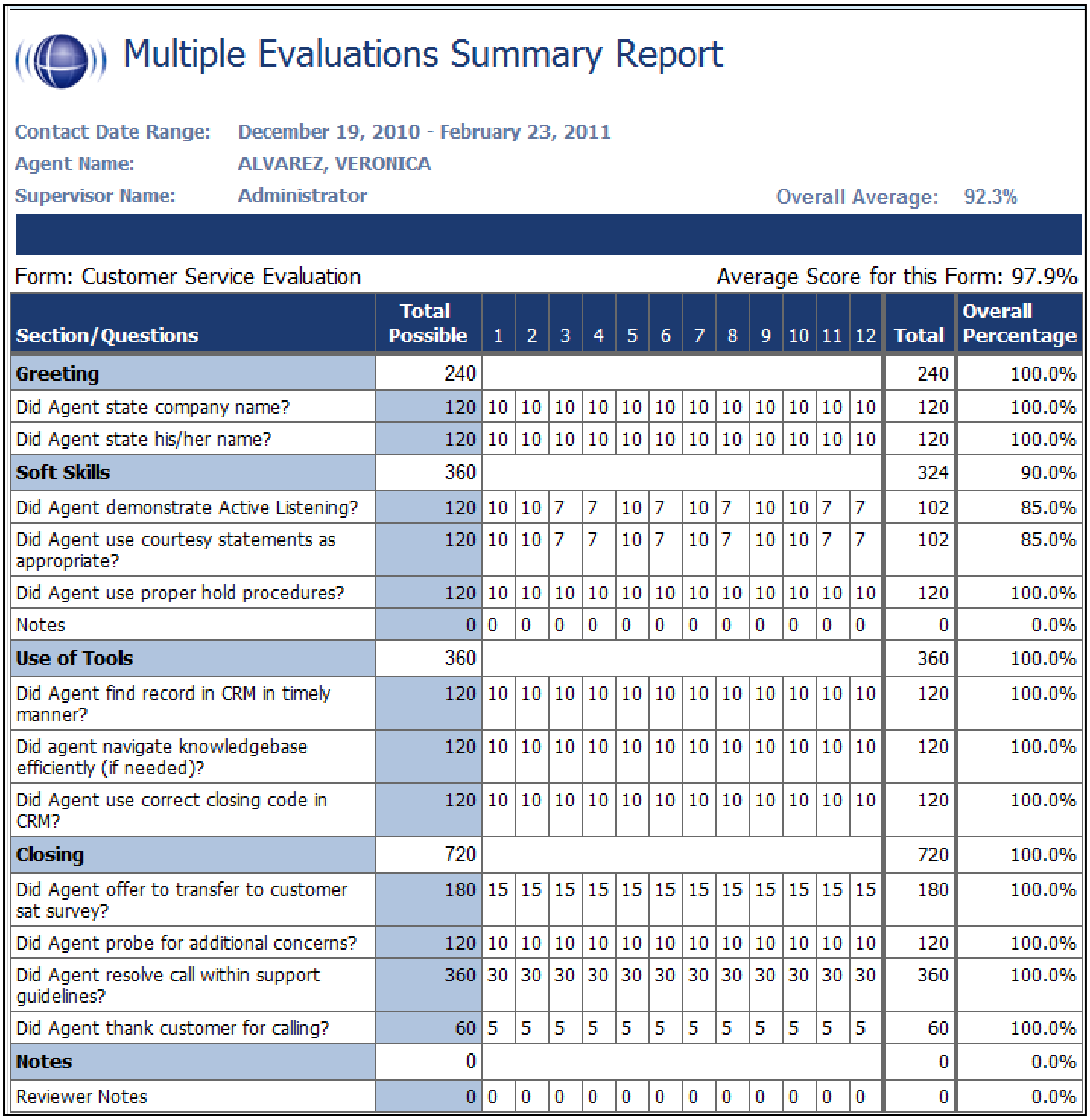
Month	Year	# Evaluations	Score	Possible Score	Percentage
September	2010	358	36560	40565	90.1%
October	2010	444	47096	51110	92.1%
November	2010	552	57454	63110	91.0%
December	2010	738	75126	82455	91.1%
January	2011	999	102264	112040	91.3%
February	2011	1261	128843	140725	91.6%

Group Summary By Period - 2/24/2011 CallCopy Recorder Reporting Service Page 1 of 1

Multiple Evaluations Summary

This report displays the last 12 evaluations that were conducted on a selected agent and form, based on a selected end date. Agent ID and Form ID are required fields.





Multiple Evaluations Summary Report

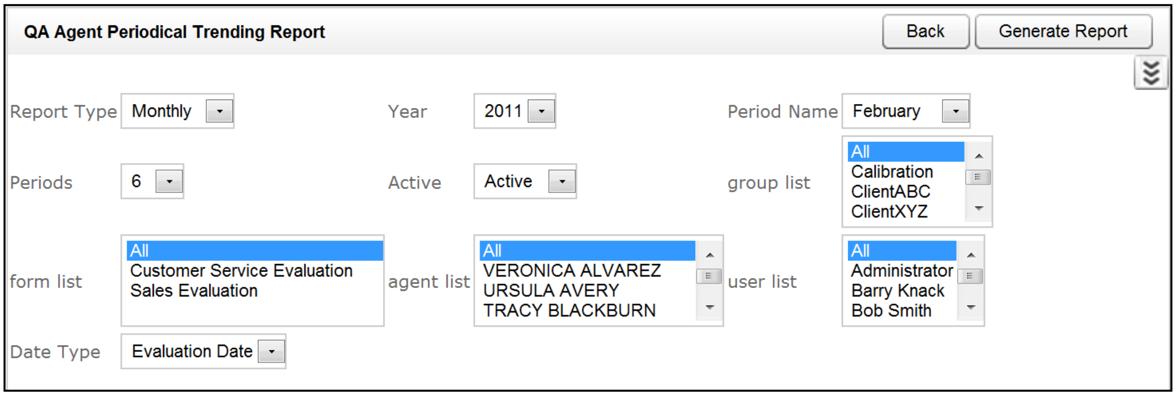
Contact Date Range: December 19, 2010 - February 23, 2011
Agent Name: ALVAREZ, VERONICA
Supervisor Name: Administrator
Overall Average: 92.3%

Form: Customer Service Evaluation
Average Score for this Form: 97.9%

Section/Questions	Total Possible	1	2	3	4	5	6	7	8	9	10	11	12	Total	Overall Percentage
Greeting	240													240	100.0%
Did Agent state company name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent state his/her name?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Soft Skills	360													324	90.0%
Did Agent demonstrate Active Listening?	120	10	10	7	7	10	7	10	7	10	10	7	7	102	85.0%
Did Agent use courtesy statements as appropriate?	120	10	10	7	7	10	7	10	7	10	10	7	7	102	85.0%
Did Agent use proper hold procedures?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Notes	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%
Use of Tools	360													360	100.0%
Did Agent find record in CRM in timely manner?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did agent navigate knowledgebase efficiently (if needed)?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent use correct closing code in CRM?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Closing	720													720	100.0%
Did Agent offer to transfer to customer sat survey?	180	15	15	15	15	15	15	15	15	15	15	15	15	180	100.0%
Did Agent probe for additional concerns?	120	10	10	10	10	10	10	10	10	10	10	10	10	120	100.0%
Did Agent resolve call within support guidelines?	360	30	30	30	30	30	30	30	30	30	30	30	30	360	100.0%
Did Agent thank customer for calling?	60	5	5	5	5	5	5	5	5	5	5	5	5	60	100.0%
Notes	0													0	0.0%
Reviewer Notes	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0.0%

QA Agent Periodical Trending Report

This report displays the summary of an agent's performance on a particular form over a selected period of time. The performance will be broken down on a section by section basis, depending on how your QA form is created in the system. The report results returned are limited to groups with which the logged-in user shares a role.

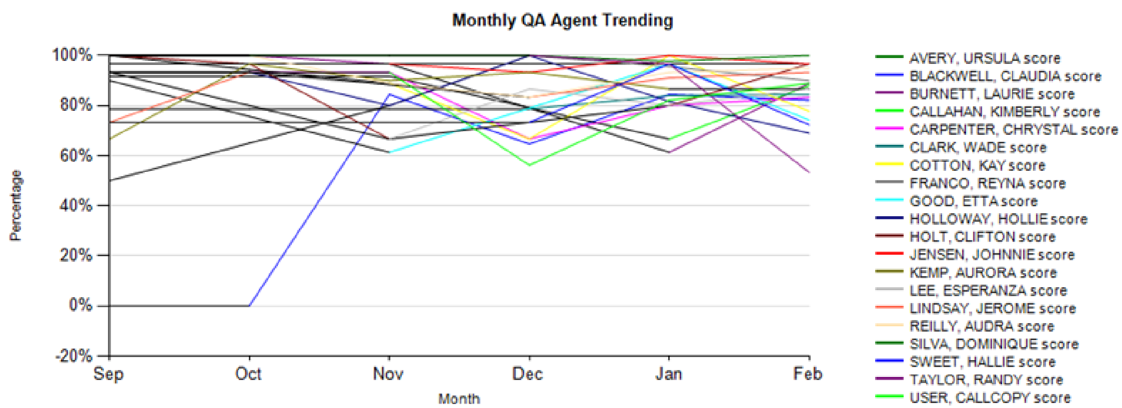


Monthly QA Agent Trending Report

For the period beginning 8/1/2010 and ending 2/28/2011

Selected Groups: ClientABC

Selected Forms: Sales Evaluation

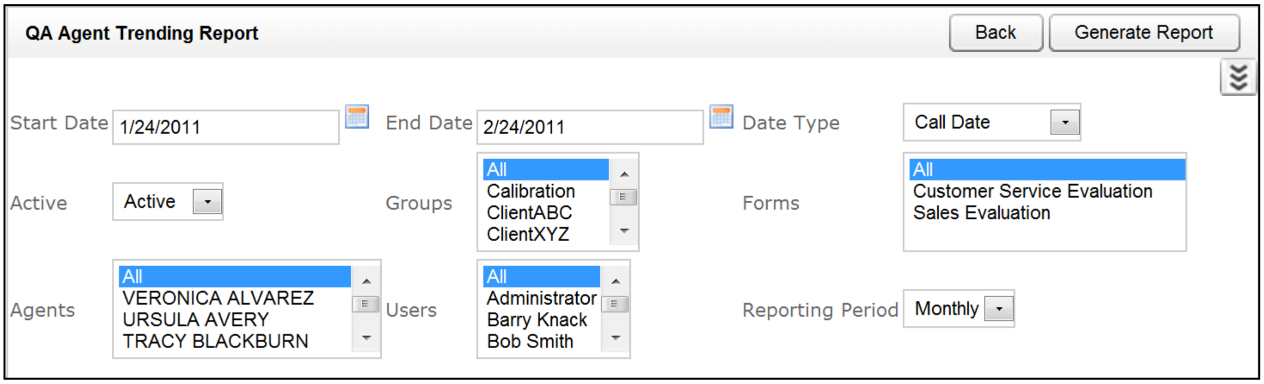


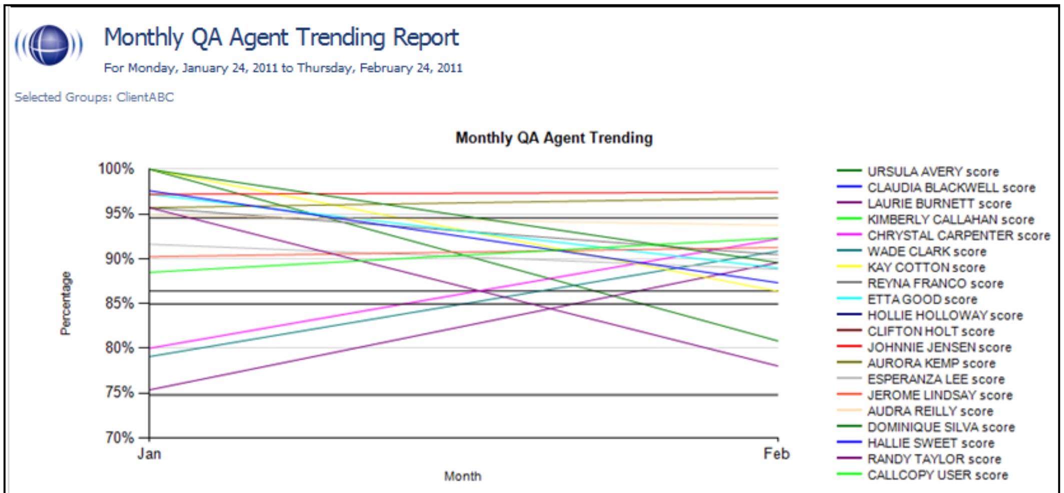
Sales Evaluation	Sep	Oct	Nov	Dec	Jan	Feb
Greeting	93.8%	90.0%	96.7%	92.3%	97.7%	92.1%
Sales Skills	81.3%	90.0%	69.4%	86.0%	75.6%	74.6%
Documentation	68.8%	81.0%	73.3%	66.4%	74.7%	78.2%

Greeting	Sep	Oct	Nov	Dec	Jan	Feb
AVERY, URSULA	100.0%	100.0%				100.0%
BLACKWELL, CLAUDIA		0.0%	100.0%	50.0%	100.0%	100.0%
BURNETT, LAURIE		100.0%	100.0%		57.1%	100.0%
CALLAHAN, KIMBERLY			100.0%		100.0%	100.0%
CARPENTER, CHRYSTAL		100.0%	100.0%	100.0%	100.0%	100.0%
CLARK, WADE				80.0%	100.0%	100.0%
COTTON, KAY	100.0%		100.0%	100.0%	100.0%	66.7%
FRANCO, REYNA	50.0%		100.0%	100.0%	100.0%	100.0%
GOOD, ETTA	100.0%		50.0%	75.0%	100.0%	66.7%

QA Agent Trending Report

This report displays the summary of an agent's performance on a particular form over a selected period of time. The performance will be broken down on a section by section, and question by question basis, depending on how your QA form is created in the system. The report results returned are limited to groups with which the logged-in user shares a role.

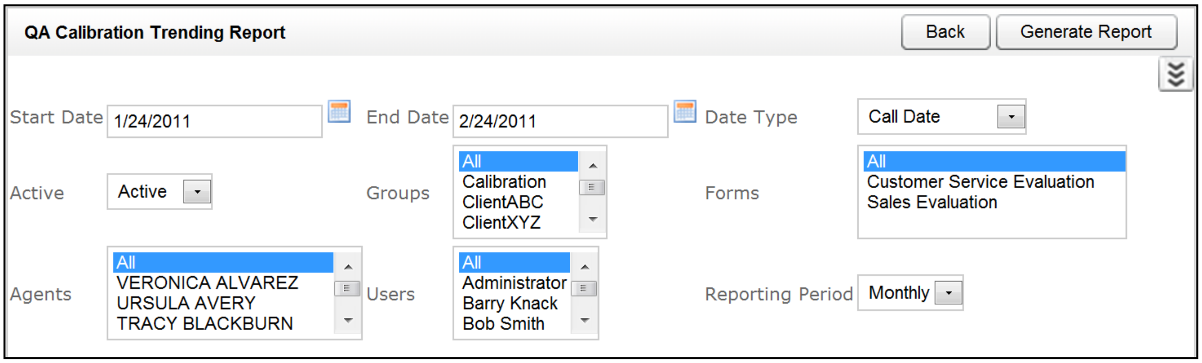




	2011	
	Jan	Feb
AVERY, URSULA	100.0%	80.8%
Customer Service Evaluation	100.0%	77.4%
Greeting	100.0%	80.0%
Did Agent state company name?	100.0%	80.0%
Did Agent state his/her name?	100.0%	80.0%
Soft Skills	100.0%	68.0%
Did Agent use courtesy statements as appropriate?	100.0%	62.0%
Did Agent demonstrate Active Listening?	100.0%	62.0%
Did Agent use proper hold procedures?	100.0%	80.0%
Notes	N/A	N/A
Use of Tools	100.0%	80.0%
Did Agent use correct closing code in CRM?	100.0%	80.0%
Did Agent find record in CRM in timely manner?	100.0%	80.0%
Did agent navigate knowledgebase efficiently (if needed)?	100.0%	80.0%
Closing	100.0%	80.0%
Did Agent resolve call within support guidelines?	100.0%	80.0%
Did Agent probe for additional concerns?	100.0%	80.0%
Did Agent thank customer for calling?	100.0%	80.0%

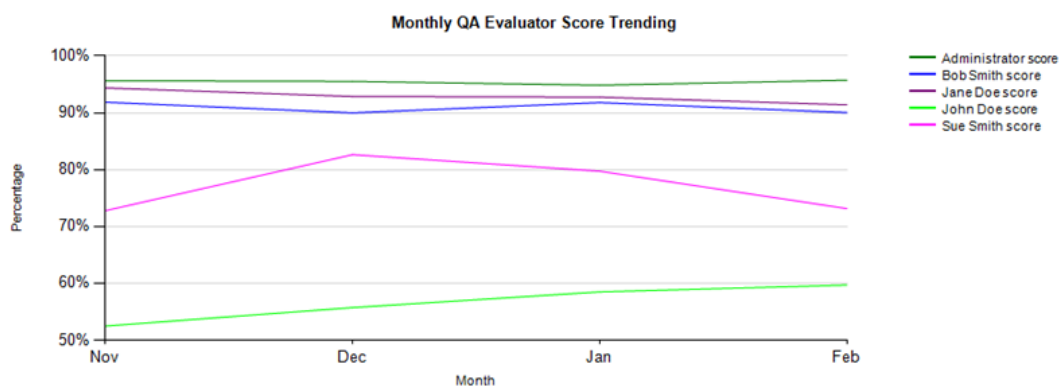
QA Calibration Trending Report

This report displays the detail of an Evaluator's performance on a particular form over a selected period of time. The performance will be broken down on a section by section, and question by question basis, depending on how your QA form is created in the system.



Monthly QA Calibration Trending Report

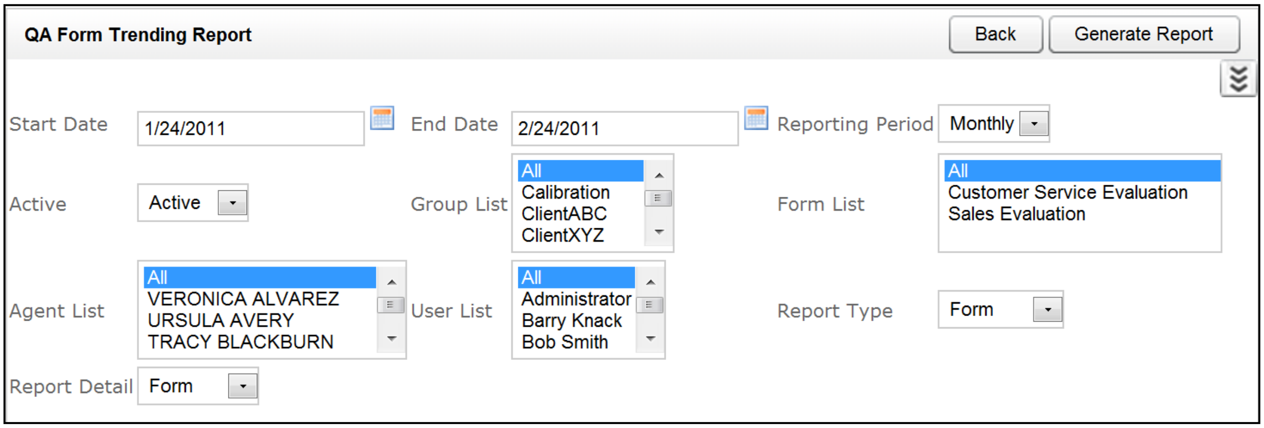
For Monday, November 01, 2010 to Thursday, February 24, 2011

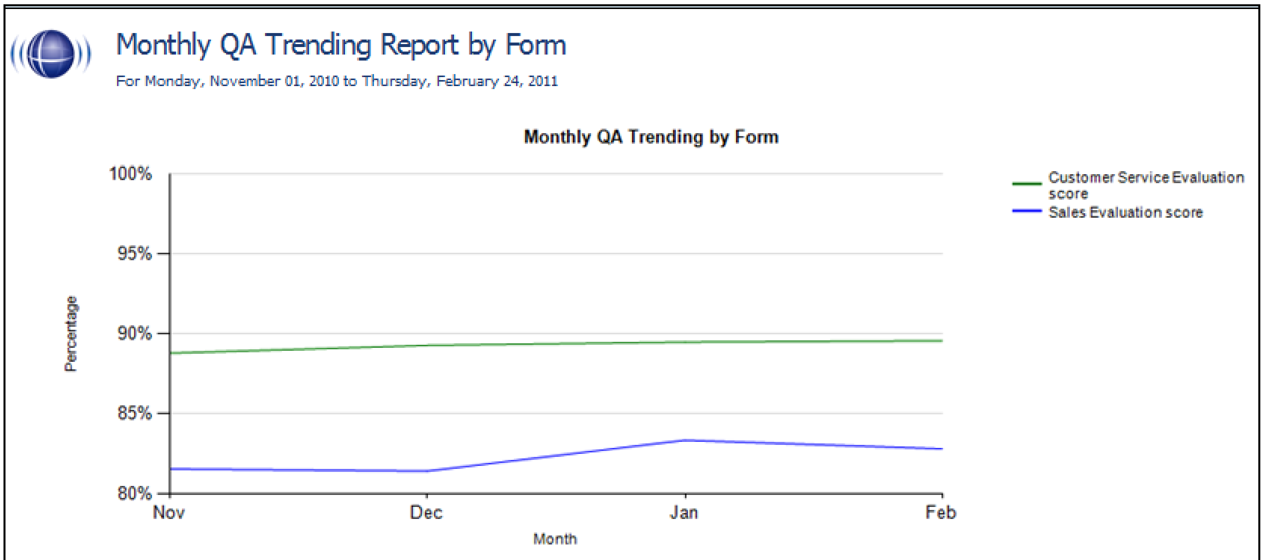


	2010		2011	
	Nov	Dec	Jan	Feb
Administrator	95.6%	95.5%	94.8%	95.7%
Customer Service Evaluation	96.2%	95.9%	95.4%	96.5%
Greeting	100.0%	98.9%	98.1%	99.4%
Did Agent state company name?	100.0%	98.9%	98.1%	99.4%
Did Agent state his/her name?	100.0%	98.9%	98.1%	99.4%
Soft Skills	86.6%	86.6%	86.9%	87.9%
Did Agent use courtesy statements as appropriate?	79.3%	79.8%	80.0%	81.4%
Did Agent demonstrate Active Listening?	80.6%	80.6%	81.4%	82.2%
Did Agent use proper hold procedures?	100.0%	99.5%	99.3%	100.0%
Notes	N/A	N/A	N/A	N/A
Use of Tools	95.8%	95.9%	94.2%	96.4%
Did Agent use correct closing code in CRM?	100.0%	99.5%	99.3%	100.0%
Did Agent find record in CRM in timely manner?	93.8%	94.7%	91.1%	94.8%
Did agent navigate knowledgebase efficiently (if needed)?	93.8%	93.6%	92.2%	94.5%
Closing	100.0%	99.5%	99.3%	100.0%
Did Agent resolve call within support guidelines?	100.0%	99.5%	99.3%	100.0%
Did Agent probe for additional concerns?	100.0%	99.5%	99.3%	100.0%
Did Agent thank customer for calling?	100.0%	99.5%	99.3%	99.7%
Did Agent offer to transfer to customer sat survey?	100.0%	99.5%	99.3%	100.0%

QA Form Trending Report

This report displays the total quality performance on a particular form over a selected period of time.

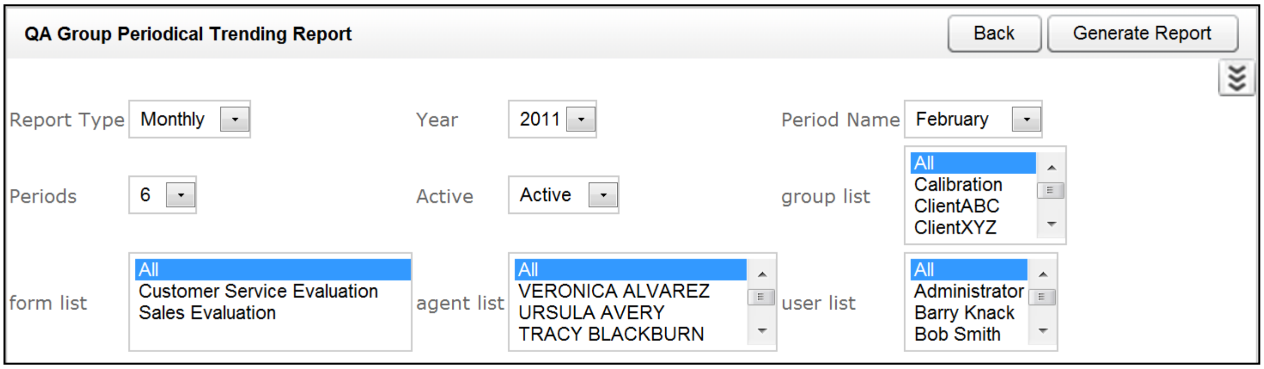




	2010		2011	
	Nov	Dec	Jan	Feb
Customer Service Evaluation	88.8%	89.3%	89.5%	89.6%
Customer Service Evaluation	88.8%	89.3%	89.5%	89.6%
Sales Evaluation	81.5%	81.4%	83.3%	82.8%
Sales Evaluation	81.5%	81.4%	83.3%	82.8%

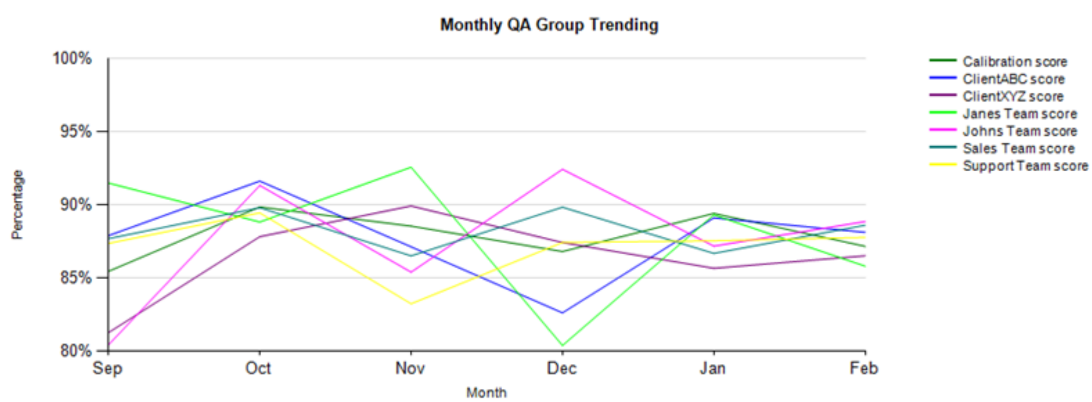
QA Group Periodical Trending Report

This report displays the performance of a selected group(s) on a form(s), charted over a certain number of periods (daily, weekly, monthly, quarterly, or yearly) based on your selection of a targeted end period. The data is broken down section by section.



Monthly QA Group Trending Report

For the period beginning 8/1/2010 and ending 2/28/2011



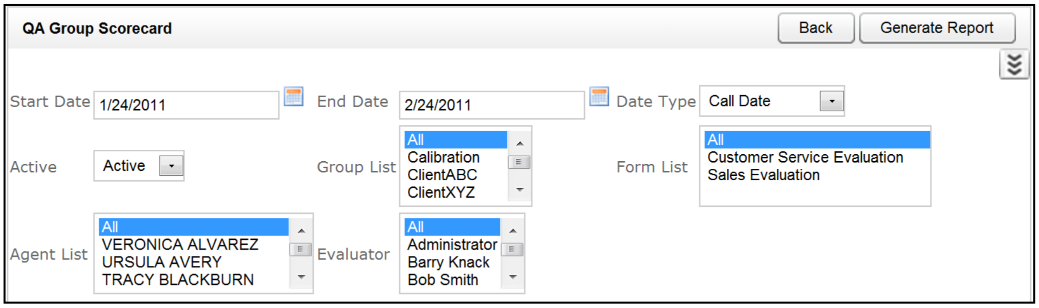
Customer Service Evaluation	Sep - 10	Oct - 10	Nov - 10	Dec - 10	Jan - 11	Feb - 11
Greeting	85.3%	91.2%	88.3%	89.0%	89.7%	91.0%
Soft Skills	79.0%	83.0%	80.2%	80.6%	80.4%	80.2%
Use of Tools	81.8%	87.2%	84.2%	84.8%	84.4%	85.2%
Closing	95.3%	97.5%	95.5%	95.9%	96.5%	96.0%
Notes	N/A	N/A	N/A	N/A	N/A	N/A

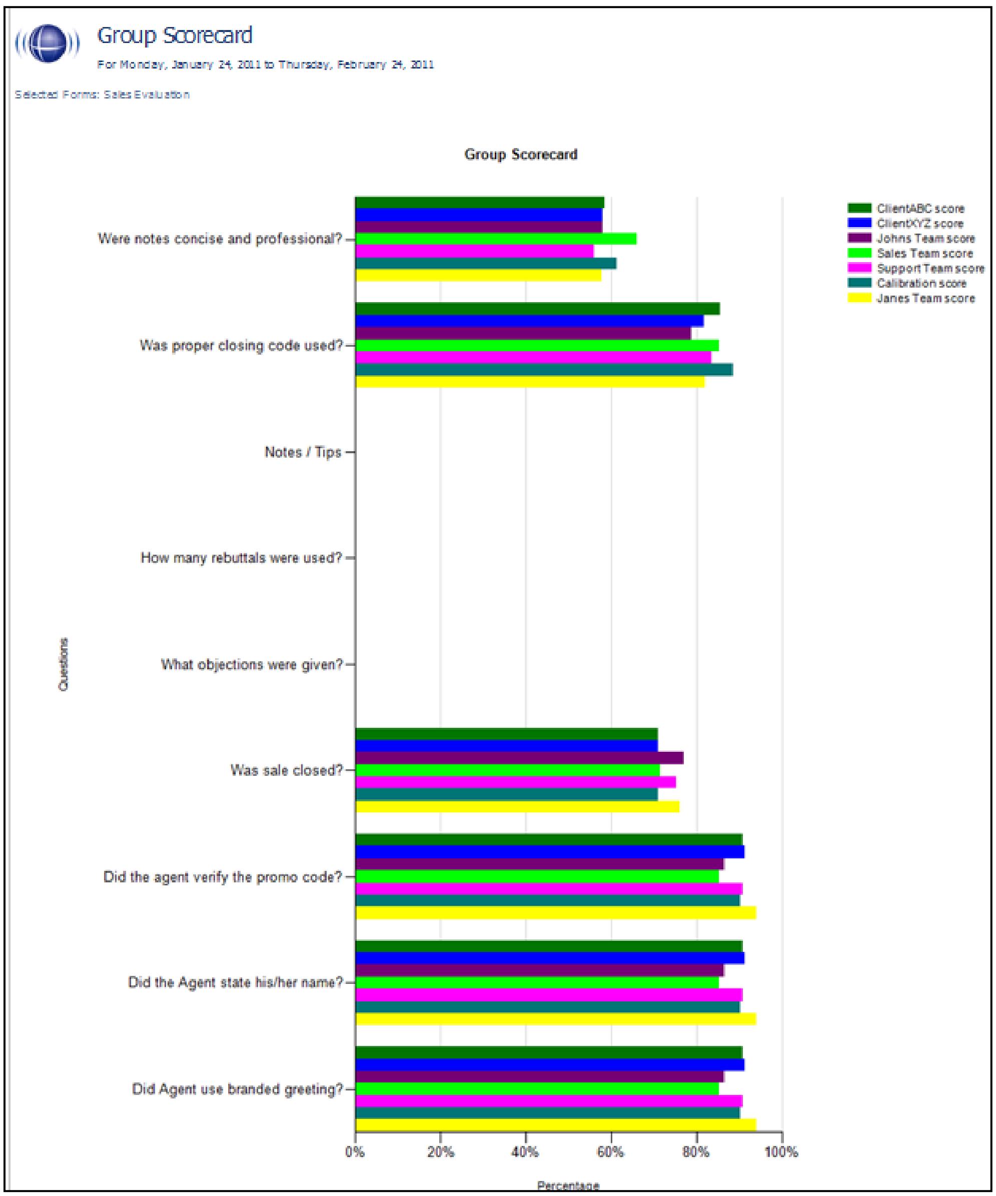
Sales Evaluation	Sep - 10	Oct - 10	Nov - 10	Dec - 10	Jan - 11	Feb - 11
Greeting	92.5%	95.3%	91.3%	91.0%	91.1%	90.4%
Sales Skills	76.2%	80.6%	72.9%	74.8%	74.1%	74.4%
Documentation	66.7%	68.8%	69.4%	68.7%	74.6%	74.0%

Greeting	Sep - 10	Oct - 10	Nov - 10	Dec - 10	Jan - 11	Feb - 11
Calibration	83.3%	96.2%	91.7%	90.9%	92.5%	88.5%
ClientABC	85.7%	93.3%	88.2%	80.9%	92.2%	90.4%
ClientXYZ	80.6%	90.0%	93.5%	88.3%	88.8%	90.0%
Janes Team	91.7%	92.3%	96.2%	72.7%	92.9%	88.9%
Johns Team	75.0%	93.8%	82.6%	95.8%	85.7%	94.1%
Sales Team	90.5%	88.6%	85.4%	91.2%	87.5%	94.3%
Support Team	87.5%	88.5%	83.7%	92.0%	88.8%	91.4%

QA Group Scorecard

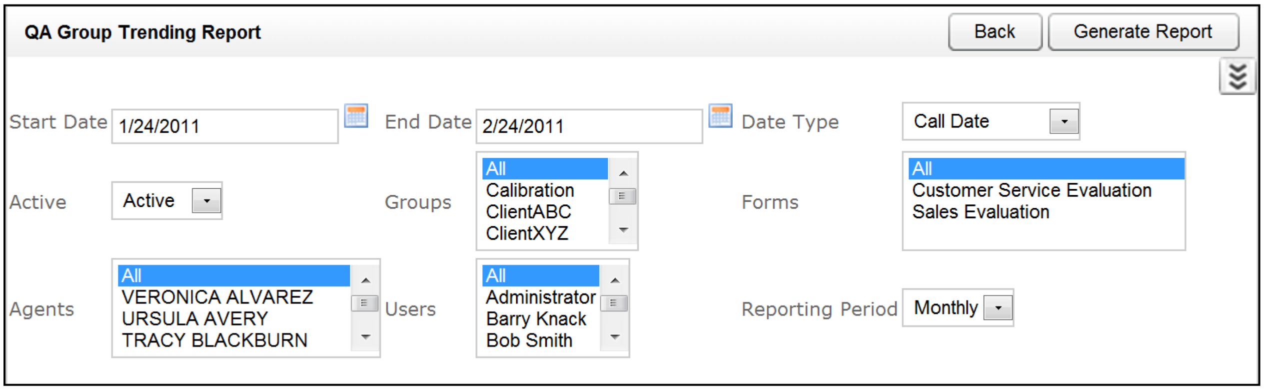
This report displays a group by group comparison of quality results of a form, at a question level, based on a selected period of time.





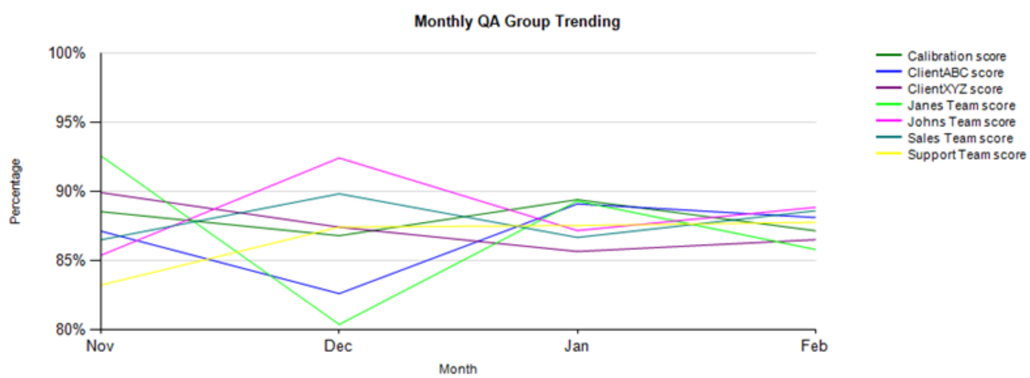
QA Group Trending Report

This report displays a group by group comparison of quality results of a form, at a question level, based on a selected period of time. The data is compared daily, weekly, monthly, or yearly based on your selection.



Monthly QA Group Trending Report

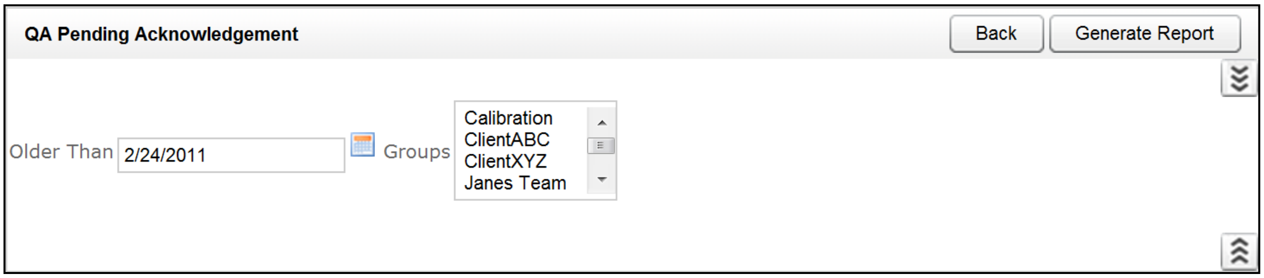
For Monday, November 01, 2010 to Thursday, February 24, 2011



	2010		2011	
All	Nov	Dec	Jan	Feb
Calibration	88.5%	86.8%	89.4%	87.2%
Customer Service Evaluation	90.7%	89.1%	90.8%	88.8%
Greeting	91.7%	90.9%	92.5%	88.5%
Did Agent state company name?	91.7%	90.9%	92.5%	88.5%
Did Agent state his/her name?	91.7%	90.9%	92.5%	88.5%
Soft Skills	81.1%	81.5%	81.2%	80.3%
Did Agent use courtesy statements as appropriate?	72.6%	74.7%	71.7%	71.5%
Did Agent demonstrate Active Listening?	73.5%	76.2%	73.8%	73.6%
Did Agent use proper hold procedures?	97.2%	93.5%	98.1%	95.9%
Notes	N/A	N/A	N/A	N/A
Use of Tools	87.0%	86.6%	85.2%	83.9%
Did Agent use correct closing code in CRM?	97.2%	93.5%	98.1%	95.9%
Did Agent find record in CRM in timely manner?	84.7%	83.1%	78.3%	75.4%
Did agent navigate knowledgebase efficiently (if needed)?	79.2%	83.1%	79.2%	80.3%
Closing	97.0%	93.5%	97.8%	95.7%
Did Agent resolve call within support guidelines?	97.2%	93.5%	98.1%	95.9%
Did Agent probe for additional concerns?	97.2%	93.5%	98.1%	95.9%
Did Agent thank customer for calling?	94.4%	93.5%	94.3%	93.4%
Did Agent offer to transfer to customer sat survey?	97.2%	93.5%	98.1%	95.9%

QA Pending Acknowledgement

This report displays a list of the unacknowledged QA evaluations that are still in the system, on an agent by agent, and form by form basis. This report is only needed if you are sending Acknowledgement requests to your Agents using the CallCopy system.



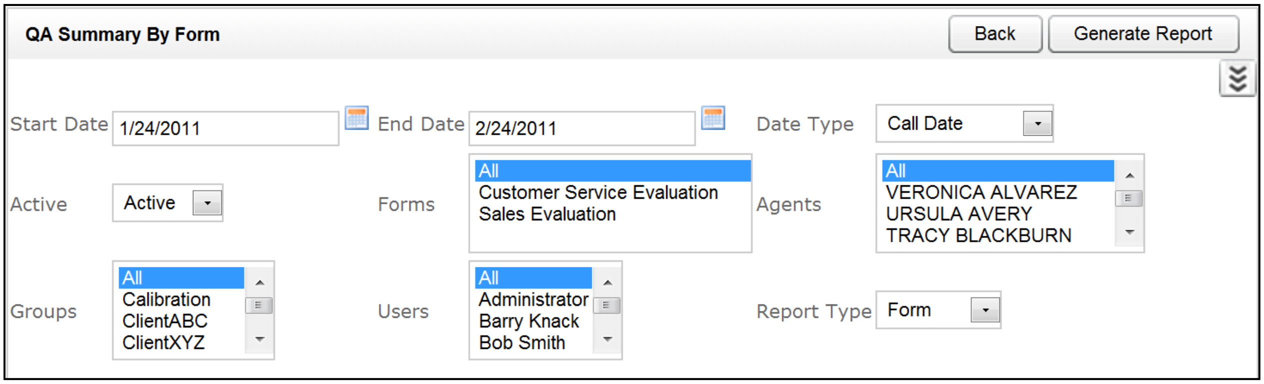
QA Pending Acknowledgement

Selected Groups: ClientXYZ

Form	Agent	Call ID	Evaluator	Completed Date	Status
Customer Service Evaluation	ALVAREZ, VERONICA	1965	Administrator	3/30/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	2206	Administrator	8/2/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	5209	Bob Smith	8/6/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	6824	Administrator	9/15/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	1128	Administrator	9/27/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	1128	John Doe	9/27/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	3220	Sue Smith	10/3/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	957	Sue Smith	11/9/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	4780	Bob Smith	11/12/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	3047	Jane Doe	11/17/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	6209	Administrator	12/4/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	8703	Administrator	12/12/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	8173	Jane Doe	12/20/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	7466	Administrator	12/20/2010	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	4311	Administrator	1/4/2011	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	4303	Administrator	1/31/2011	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	3853	Jane Doe	2/8/2011	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	390	John Doe	2/11/2011	Unacknowledged
Customer Service Evaluation	ALVAREZ, VERONICA	8108	Jane Doe	2/22/2011	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	3527	John Doe	5/11/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	1039	Administrator	5/31/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	4434	Jane Doe	7/24/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	8793	Jane Doe	10/12/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	5744	Administrator	12/6/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	2691	Jane Doe	12/9/2010	Unacknowledged
Customer Service Evaluation	BLACKBURN, TRACY	7265	Bob Smith	1/13/2011	Unacknowledged

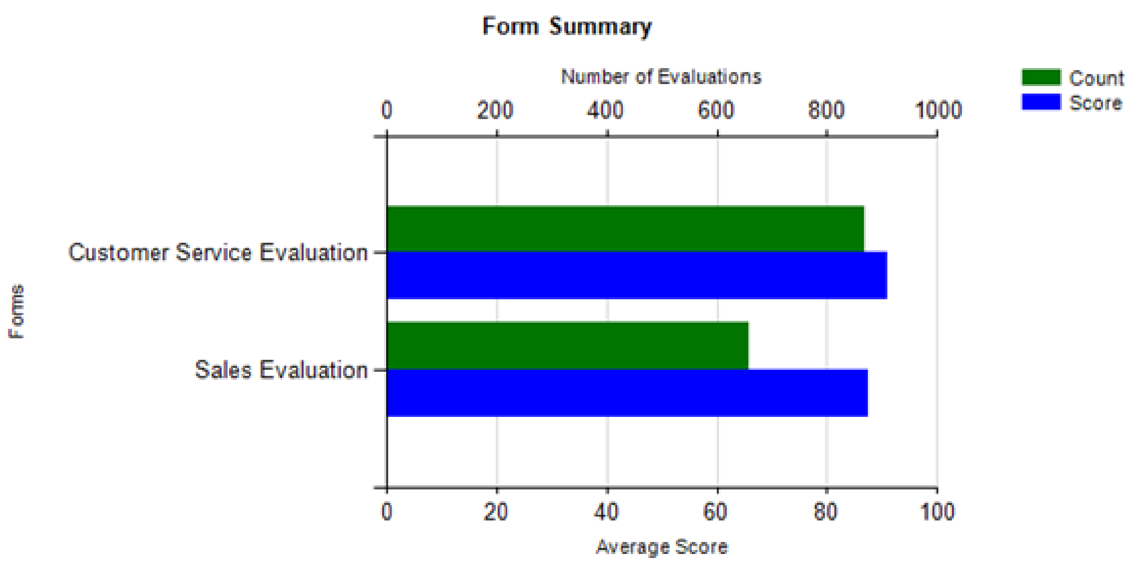
QA Summary by Form

This report displays the QA performance on a form(s) over a period of time. This report can be drilled down into for additional details.



Form Performance Summary Report

For Monday, January 24, 2011 to Thursday, February 24, 2011

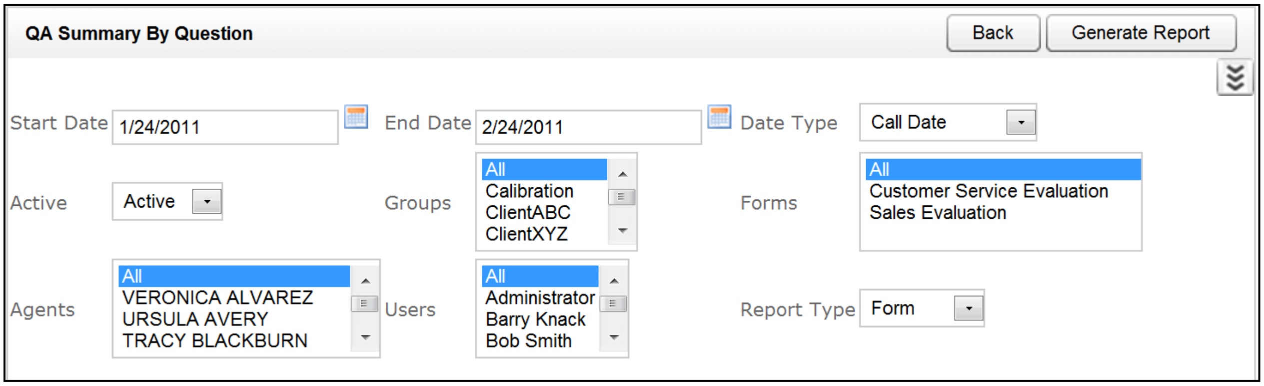


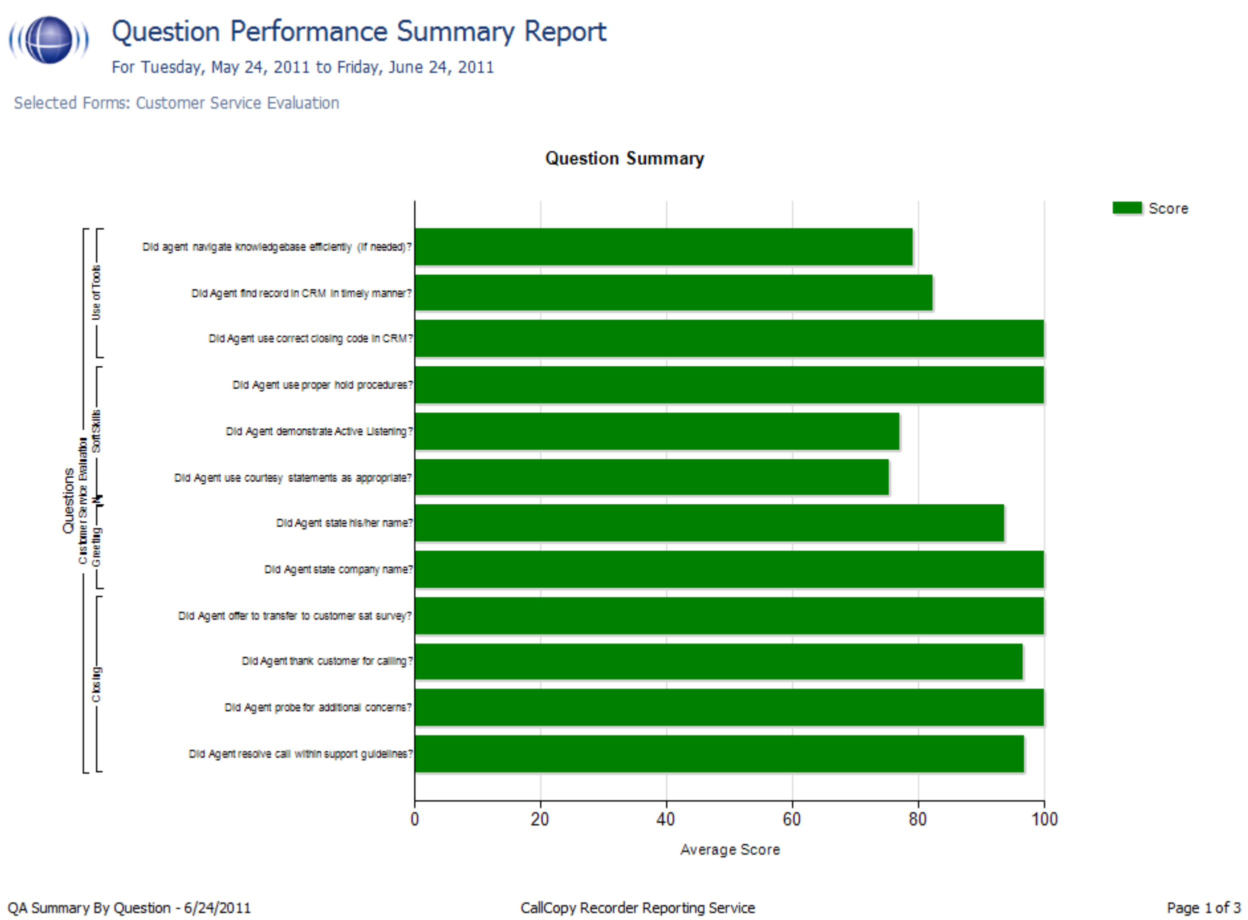
Form	# Evaluations	Score	Possible Score	Percentage
Customer Service Evaluation	870	112814.00	121800.00	91.1%
Sales Evaluation	660	43937.00	49500.00	87.6%

QA Summary By Form - 2/24/2011 CallCopy Recorder Reporting Service Page 1 of 1

QA Summary by Question

This report displays the QA performance on a form's questions over a period of time. This report can be drilled down into for additional details.





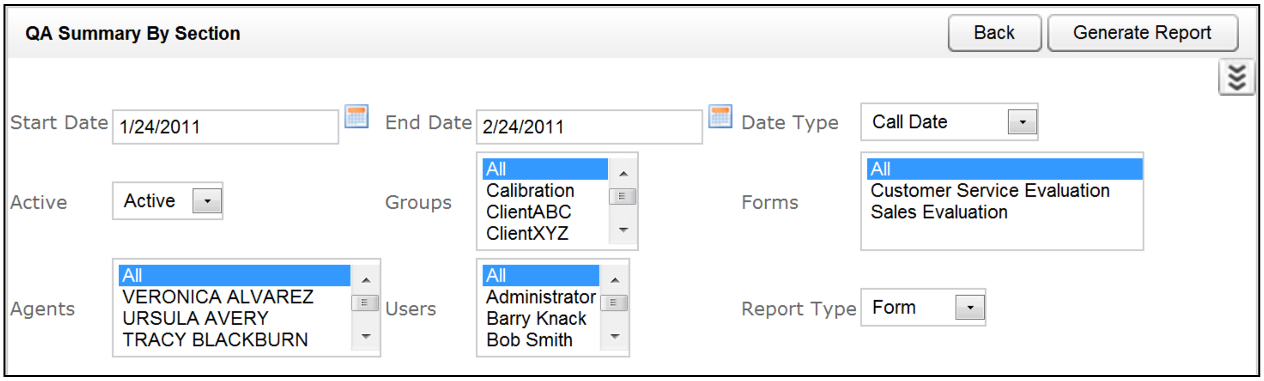
Question Performance Summary Report

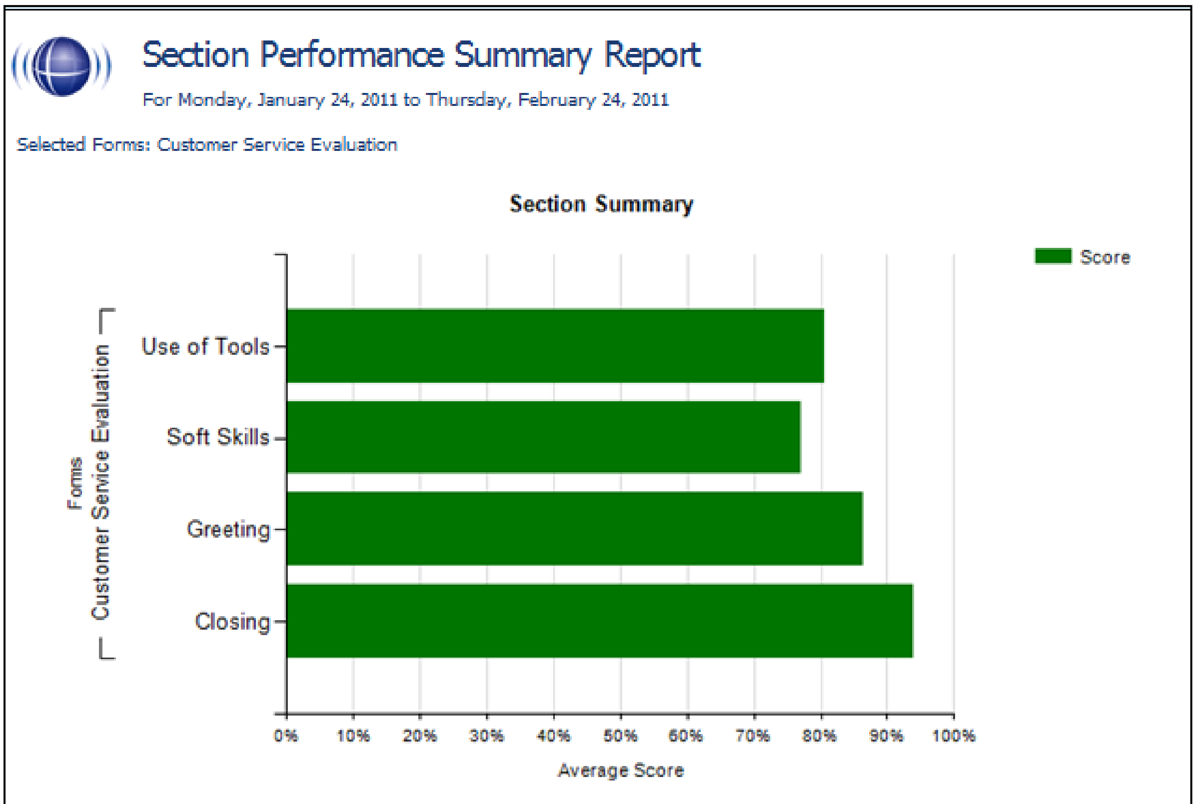
For Monday, January 24, 2011 to Thursday, February 24, 2011

Form: Sales Evaluation	**660 Forms Scored**			**Grade:**	**88.8%**
Section: Greeting				**Grade:**	**98%**
Did Agent use branded greeting?		**Auto-Fail**	**Value**	**Grade:**	**97.0%**
Yes	640 (97%)	None	10.00 of 10.00		
No	20 (3%)	Section	0.00 of 10.00		
Did the Agent state his/her name?		**Auto-Fail**	**Value**	**Grade:**	**100.0%**
Yes	637 (97%)	None	10.00 of 10.00		
No	23 (3%)	Section	0.00 of 10.00		
Did the agent verify the promo code?		**Auto-Fail**	**Value**	**Grade:**	**96.5%**
Yes	637 (97%)	None	20.00 of 20.00		
No	23 (3%)	Form	0.00 of 20.00		
Section: Sales Skills				**Grade:**	**77%**
Was sale closed?		**Auto-Fail**	**Value**	**Grade:**	**76.7%**
Yes	506 (77%)	None	10.00 of 0.00		
No	154 (23%)	None	0.00 of 0.00		
What objections were given?		**Auto-Fail**	**Value**	**Grade:**	**N/A**
Price	401 (61%)	None	0.00 of 0.00		
Delivery time	20 (3%)	None	0.00 of 0.00		
Item not available	134 (20%)	None	0.00 of 0.00		
No objections given	105 (16%)	None	0.00 of 0.00		
How many rebuttals were used?		**Auto-Fail**	**Value**	**Grade:**	**N/A**
None	216 (33%)	None	0.00 of 0.00		
1	20 (3%)	None	0.00 of 0.00		
2	424 (64%)	None	0.00 of 0.00		
Notes / Tips		**Auto-Fail**	**Value**	**Grade:**	**N/A**
	660 (100%)	None	N/A		
Section: Documentation				**Grade:**	**80%**
Were notes concise and professional?		**Auto-Fail**	**Value**	**Grade:**	**67.7%**
Excellent	215 (33%)	None	10.00 of 10.00		
Very Good	23 (3%)	None	7.00 of 10.00		
Good	399 (60%)	None	5.00 of 10.00		
Fair	23 (3%)	None	3.00 of 10.00		
Was proper closing code used?		**Auto-Fail**	**Value**	**Grade:**	**87.6%**
Yes	578 (88%)	None	15.00 of 15.00		
No	82 (12%)	Section	0.00 of 15.00		

QA Summary by Section

This report displays the QA performance on a form's sections over a period of time. This report can be drilled down into for additional details.

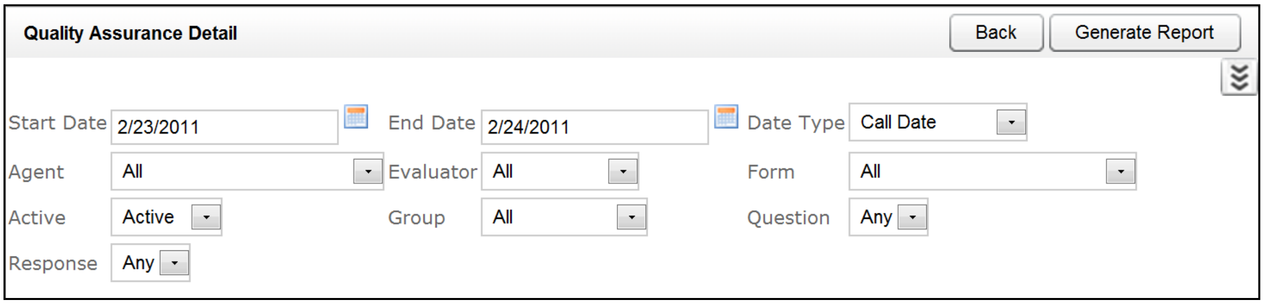


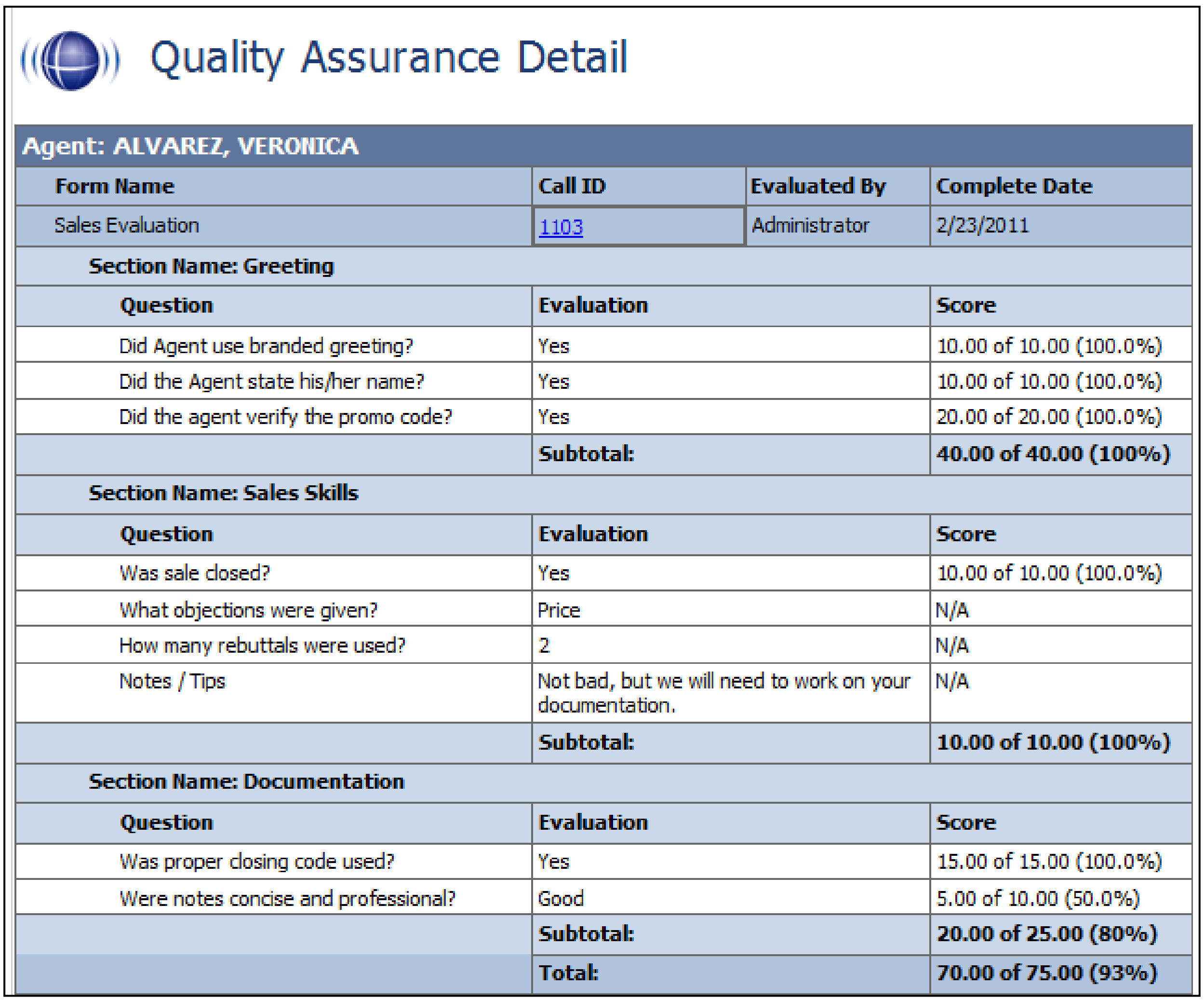


Form	# Evaluations	Score	Possible Score	Percentage
Customer Service Evaluation	870	108964.00	121800.00	84.5%
Greeting		15820.00	17400.00	86.5%
Soft Skills		20904.00	26100.00	77.1%
Use of Tools		22190.00	26100.00	80.5%
Closing		50050.00	52200.00	93.8%

Quality Assurance Detail

This report shows the individual responses to each question in a completed QA evaluation, based on the Call ID. The specific call that was graded for the evaluation can be played back by clicking on the Call ID hyperlink.



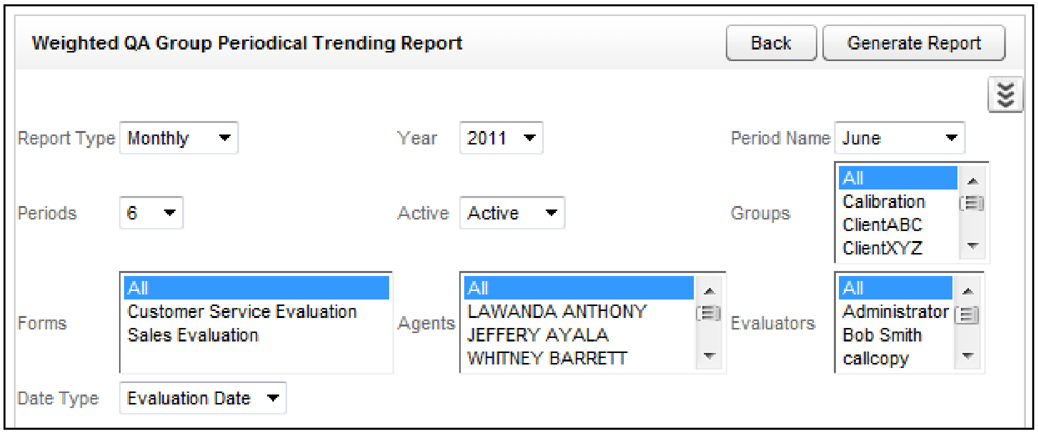


Quality Assurance Detail

Agent: ALVAREZ, VERONICA			
Form Name	**Call ID**	**Evaluated By**	**Complete Date**
Sales Evaluation	1103	Administrator	2/23/2011
Section Name: Greeting			
Question	**Evaluation**		**Score**
Did Agent use branded greeting?	Yes		10.00 of 10.00 (100.0%)
Did the Agent state his/her name?	Yes		10.00 of 10.00 (100.0%)
Did the agent verify the promo code?	Yes		20.00 of 20.00 (100.0%)
	Subtotal:		**40.00 of 40.00 (100%)**
Section Name: Sales Skills			
Question	**Evaluation**		**Score**
Was sale closed?	Yes		10.00 of 10.00 (100.0%)
What objections were given?	Price		N/A
How many rebuttals were used?	2		N/A
Notes / Tips	Not bad, but we will need to work on your documentation.		N/A
	Subtotal:		**10.00 of 10.00 (100%)**
Section Name: Documentation			
Question	**Evaluation**		**Score**
Was proper closing code used?	Yes		15.00 of 15.00 (100.0%)
Were notes concise and professional?	Good		5.00 of 10.00 (50.0%)
	Subtotal:		**20.00 of 25.00 (80%)**
	Total:		**70.00 of 75.00 (93%)**

Weighted QA Group Periodical Trending Report

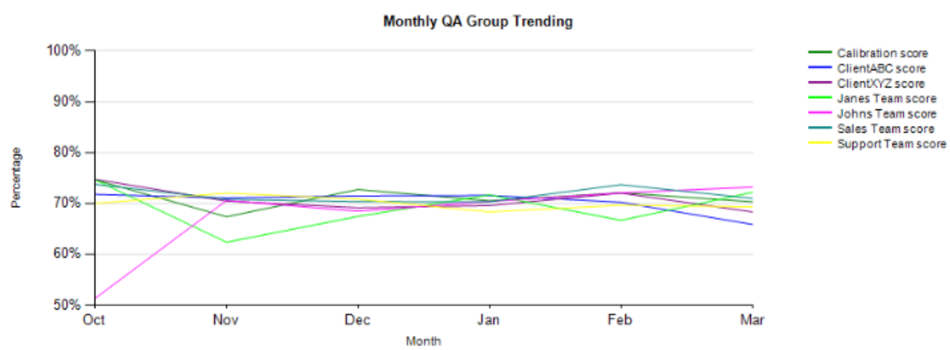
This report displays a group by group comparison of quality results of a form, at a section level, based on a selected period of time. The data is compared daily, weekly, monthly, or yearly based on your selection.



Monthly QA Group Trending Report

For the period beginning 9/1/2010 and ending 3/31/2011

Selected Forms: Customer Service Evaluation



Customer Service Evaluation	Oct	Nov	Dec	Jan	Feb	Mar
Greeting	91.0%	88.8%	91.0%	89.8%	91.3%	89.0%
Soft Skills	82.7%	80.3%	80.3%	80.5%	80.8%	80.2%
Use of Tools	86.2%	83.8%	84.3%	83.8%	85.5%	84.4%
Closing	96.8%	95.9%	97.4%	96.2%	97.4%	95.1%
Notes	0.0%	0.0%	0.0%	0.0%	0.0%	0.0%

Greeting	Oct	Nov	Dec	Jan	Feb	Mar
Calibration	98.5%	84.0%	95.1%	89.7%	92.6%	89.4%
ClientABC	88.5%	87.8%	90.8%	94.0%	90.9%	85.0%
ClientXYZ	96.4%	88.7%	89.4%	91.5%	93.0%	87.7%
Janes Team	97.5%	77.8%	85.8%	90.9%	85.0%	94.1%
Johns Team	64.3%	92.9%	89.6%	89.2%	90.9%	95.8%
Sales Team	96.7%	93.2%	87.7%	90.0%	95.5%	87.7%
Support Team	86.6%	92.7%	92.2%	86.5%	89.4%	88.0%

Soft Skills	Oct	Nov	Dec	Jan	Feb	Mar
Calibration	83.8%	78.4%	82.3%	81.7%	82.2%	80.7%
ClientABC	85.8%	83.2%	81.9%	79.1%	78.2%	74.4%
ClientXYZ	87.6%	80.8%	78.6%	79.0%	82.4%	78.0%
Janes Team	85.6%	71.9%	76.8%	84.3%	74.7%	82.1%
Johns Team	57.9%	79.0%	77.0%	81.8%	81.7%	82.4%

Ad Hoc Reports

Introduction

The ad hoc reporting feature enables users to analyze data and create custom, reusable reports. Users control the data in a report and how the data appears.

Benefits of this feature include:

- Insight into previously unknown trends and relationships between processes, resources, and other data sources via data analysis.
- More useful reports customized to a user's data and information requirements.
- Flexibility to revise reports as data and needs change.

Ten users can simultaneously use the ad hoc reporting feature in Discover.

A web.config setting limits the number of rows that any ad hoc report returns to 30,000 rows of data by default. This can be configured during installation by the Install Team, or after installation by CallCopy Support. A warning message is displayed when results exceed this limit, and this along with a 30-second time-out in the report builder prevents a user from generating a report that would bog down the system when requesting large amounts of data. If the retrieved information is incomplete, redefine the search criteria or try redesigning the report. There is no time-out presently associated with rendering the report.

Permissions

For ad hoc reports, group-level permissions are not applied, meaning that results are not limited to agents or entities in groups to which the logged-in user has permissions as they are for standard predefined printable reports – results will show all data relevant to the query. This is by design as the typical ad hoc user would be a report administrator or a select group of users (i.e., middle management), not a standard supervisor or QA analyst. Permissions to allow ad hoc reporting are detailed in the *cc: Discover Administration Manual*'s "Permissions" section.

Working With Ad Hoc Reports

The Ad Hoc Report Builder collates data that can be used to create multiple instances of a report using different report criteria values (e.g., date ranges). It can be used to generate any of the existing CallCopy reports with specific items added or removed. The end results are:

- A collection of RDL/HTML data that defines the report columns, layout, and report criteria parameters.
- Report criteria values data for the report.

The procedure for creating an ad hoc report is the same for each report category. For example, a call record ad hoc report is created using the same steps as those for creating a QA ad hoc report.

In cc: Discover, Ad Hoc Reports appears under the Reporting tab in the left navigation menu. Select the type of report from the left navigation bar.

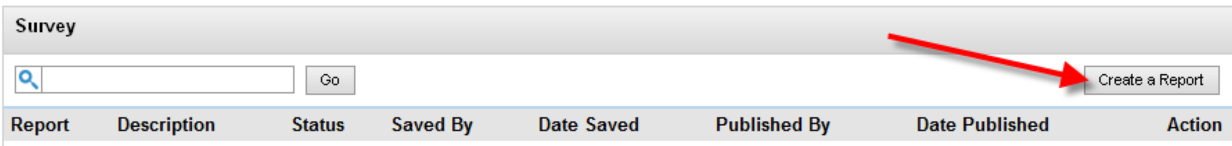
In cc: Clarity, Ad Hoc Reports appears under the Reports tab at the bottom of the page. Select the type of report from the drop-down menu.

Only report types to which the user has permissions will be displayed. To create a new report, refer to the "Create a New Ad Hoc Report" section below. To edit an existing report, please refer to the "Edit Existing Ad Hoc Reports" section of this document.

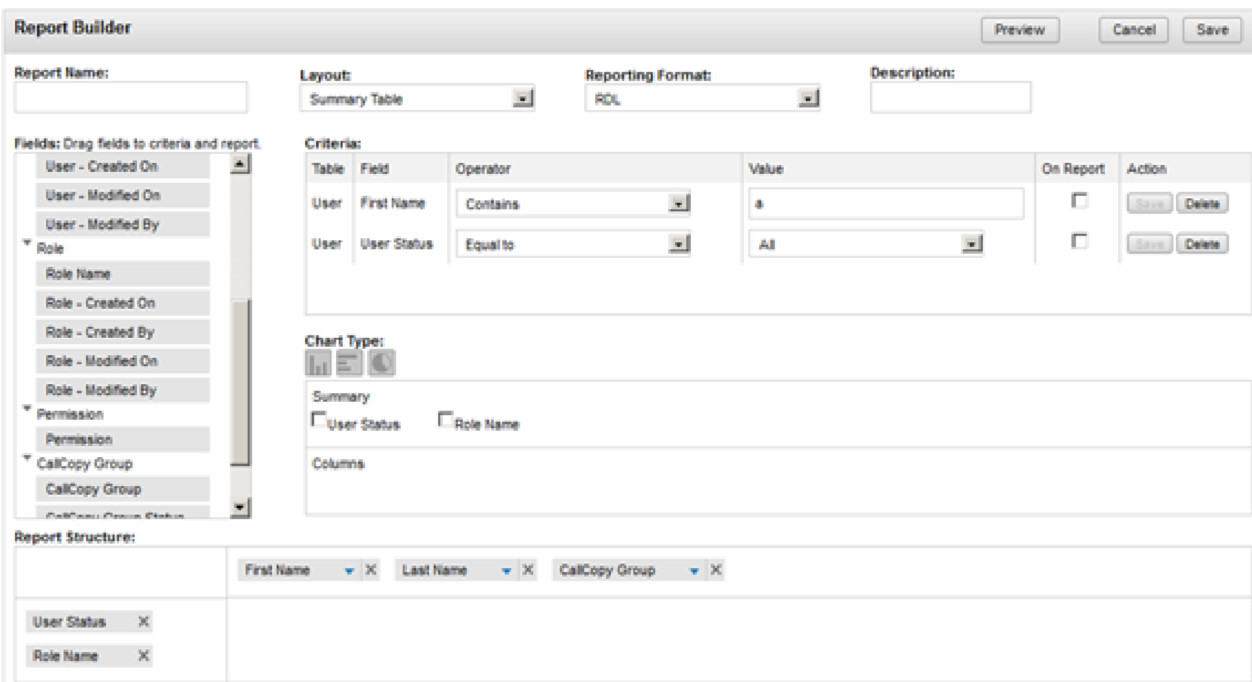
Create a New Ad Hoc Report

To create a new report:

1. Under the Reporting/Reports tab, click Ad Hoc Reports, then select the report type on the left. Click on **Create a Report** in the right.



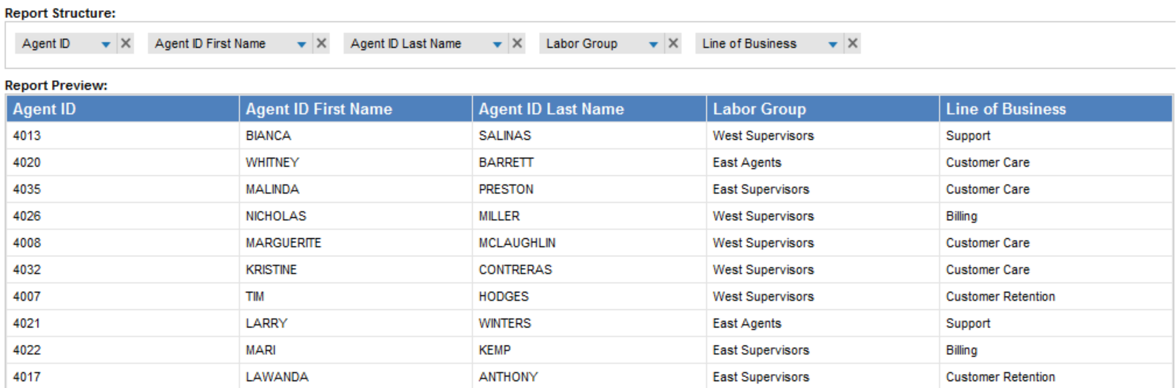
2. The **Report Builder** opens. This is the core of ad hoc reporting, and allows you to compose reports based on custom criteria and display elements. Layout and format elements are also set here.



3. Enter a name for the report. This will be displayed in the Report Library. Enter a description (optional) of up to 100 characters.

4. Choose a Layout: **Simple Table** or **Summary Table**.

    Simple Table displays a single row of cells in the Structure area, allowing creation of basic reports with data distributed along two axes. Columns can be rearranged by dragging the fields left and right.



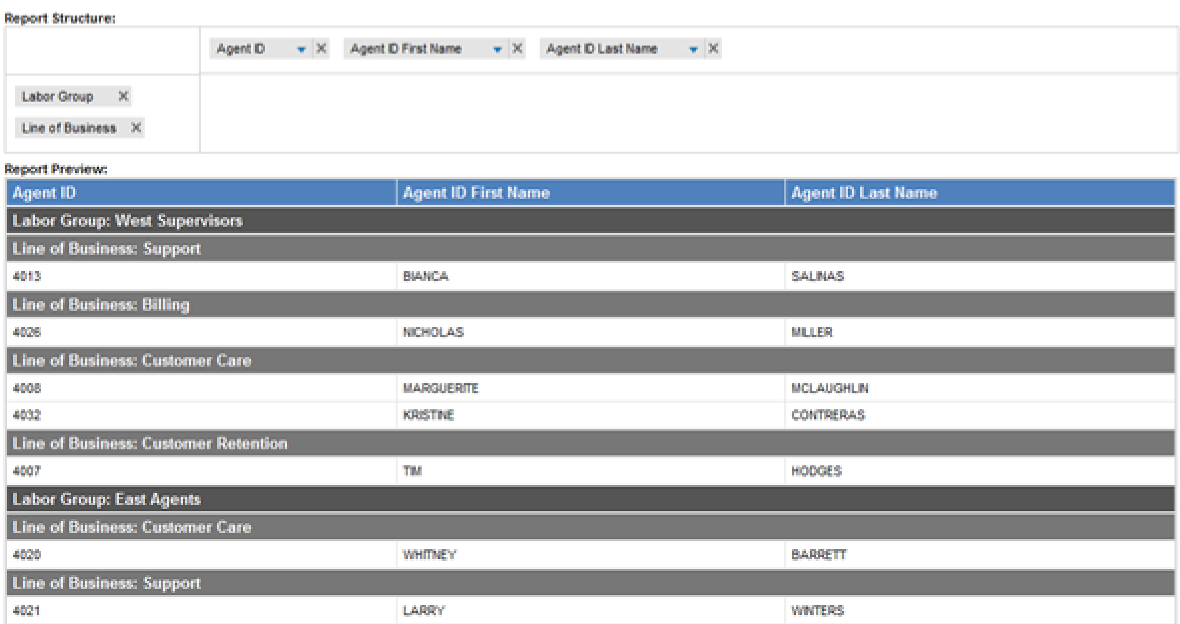
Report Structure:

Agent ID | Agent ID First Name | Agent ID Last Name | Labor Group | Line of Business

Report Preview:

Agent ID	Agent ID First Name	Agent ID Last Name	Labor Group	Line of Business
4013	BIANCA	SALINAS	West Supervisors	Support
4020	WHITNEY	BARRETT	East Agents	Customer Care
4035	MALINDA	PRESTON	East Supervisors	Customer Care
4026	NICHOLAS	MILLER	West Supervisors	Billing
4008	MARGUERITE	MCLAUGHLIN	West Supervisors	Customer Care
4032	KRISTINE	CONTRERAS	West Supervisors	Customer Care
4007	TIM	HODGES	West Supervisors	Customer Retention
4021	LARRY	WINTERS	East Agents	Support
4022	MARI	KEMP	East Supervisors	Billing
4017	LAWANDA	ANTHONY	East Supervisors	Customer Retention

    Summary Table displays a grid of cells in the Structure area, allowing creation of more advanced reports with nested, collapsible subcategories/groupings within data sets. Column fields can be dragged left and right to rearrange. Rows can be dragged up and down to regroup data, with lower fields being nested within higher fields.



Report Structure:

Agent ID | Agent ID First Name | Agent ID Last Name

Labor Group

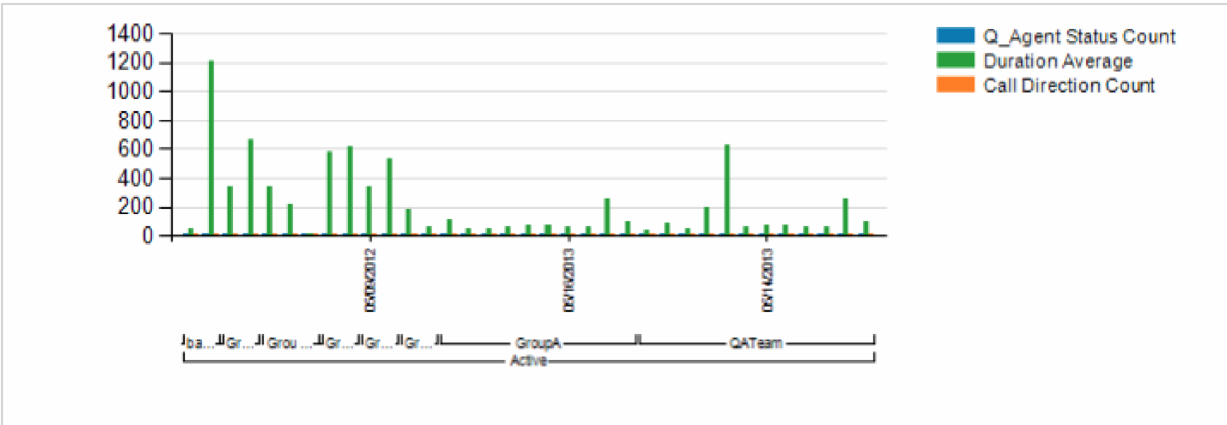
Line of Business

Report Preview:

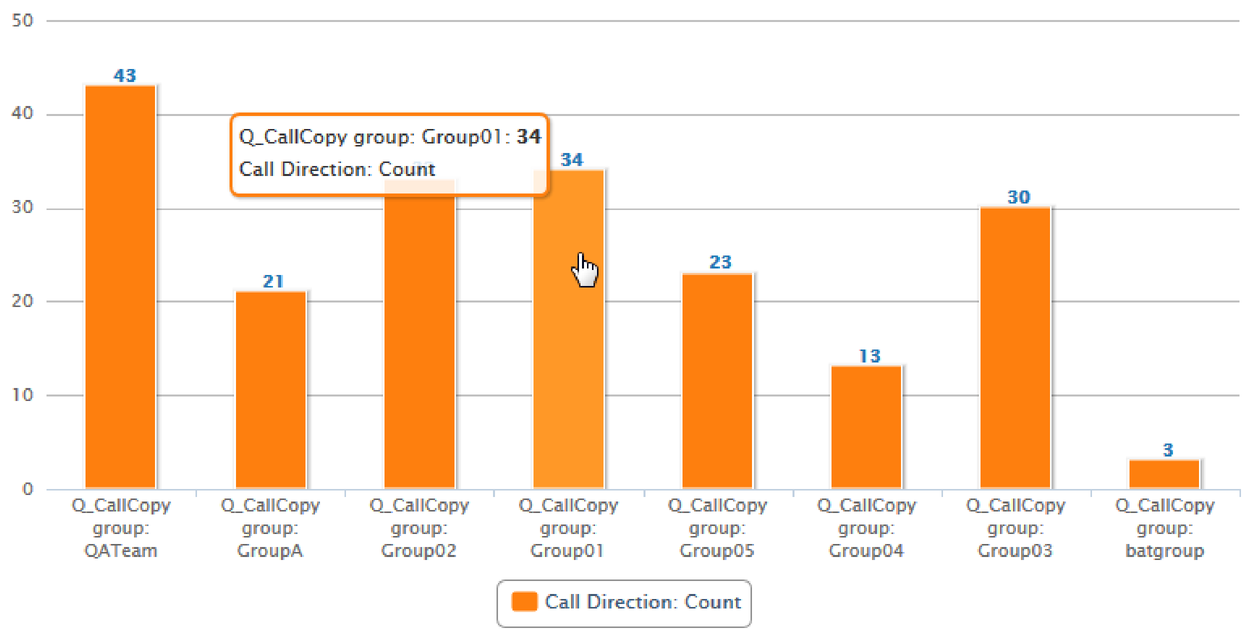
Agent ID	Agent ID First Name	Agent ID Last Name
Labor Group: West Supervisors		
Line of Business: Support		
4013	BIANCA	SALINAS
Line of Business: Billing		
4026	NICHOLAS	MILLER
Line of Business: Customer Care		
4008	MARGUERITE	MCLAUGHLIN
4032	KRISTINE	CONTRERAS
Line of Business: Customer Retention		
4007	TIM	HODGES
Labor Group: East Agents		
Line of Business: Customer Care		
4020	WHITNEY	BARRETT
Line of Business: Support		
4021	LARRY	WINTERS

5. Choose a Reporting Format: **RDL** or **HTML**. The format affects how charts display and their level of interactivity.

   RDL works with Microsoft SQL Reporting Services and can be exported as PDF, Word, or Excel files. The charts are a simple layout displaying all the information in a non-interactive way. Large reports with pagination can be created.



   HTML charts are interactive, allowing information to be displayed on mouse-over and clicking bars to cycle through drill-down levels into subcategories and more detailed results. However, this format cannot be exported, does not support pagination, and is limited to displaying only 1000 results. Works best as a basic data preview.

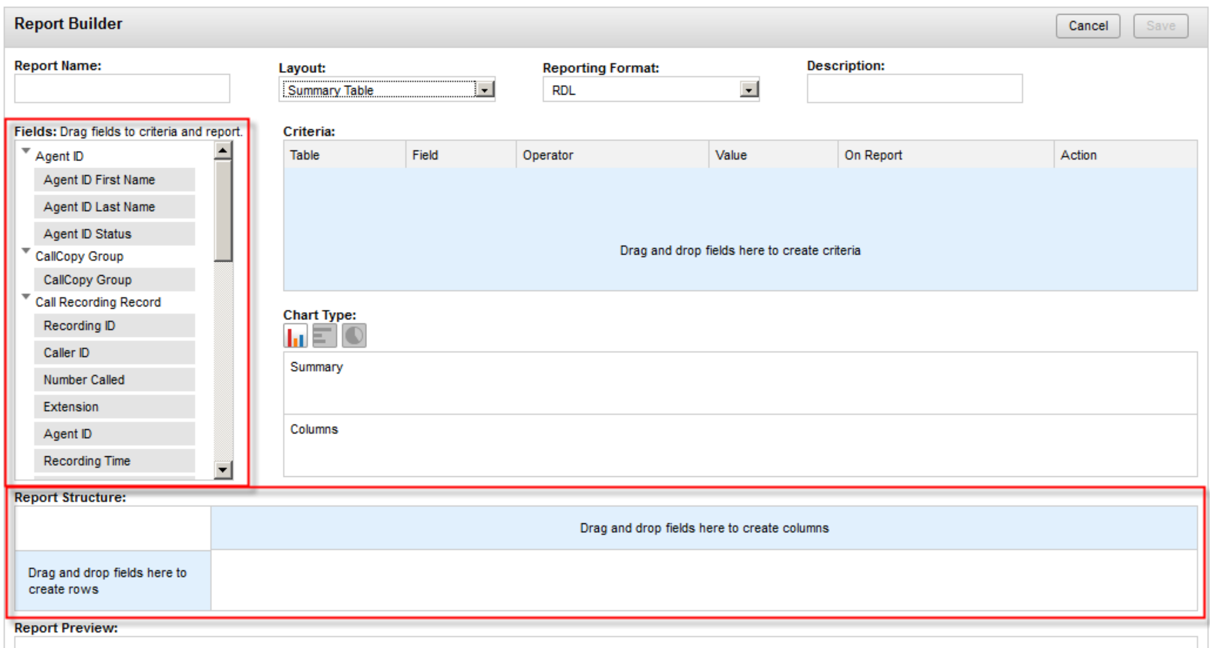


6. The **Fields** area contains all relevant data types for the given report type, and including custom field names from the cc: Discover Terminology page.

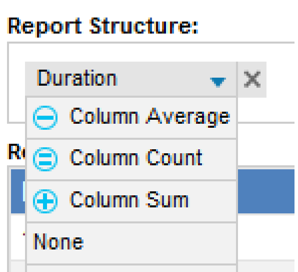
   Notes

   - Terminology page settings changes will not appear in the ad hoc reporting pages immediately. The cc: Discover application pool in IIS must be recycled in order for the changes to appear.
   - User Status and Agent Status indicate the same thing – whether the user is active or inactive/deleted. Agent Status presently does not indicate whether an agent is, was, or has ever been an agent.

   Drag the desired fields into the **Report Structure** area. Columns represent what will be X-axis labels and Rows represent Y-axis labels on the resulting report. Fields cannot be duplicated within the row or column areas, but may be used to create one row and one column for a particular data type.



7. The data for that cell column/row appears in the **Report Preview** area. To remove a field, click the X on the field label. Click on the downward arrow on a Column field for additional display options relevant to the data type, including **Column Average**, **Column Count**, and **Column Sum**.



The results are totaled per summary group, and per total of all groups at the bottom. This data is also used to generate charts.

Report Preview:

Agent ID First Name	Agent ID Last Name	Agent ID Status	Duration
Agent ID Status: Inactive			
BIANCA	SALINAS	Inactive	372
WHITNEY	BARRETT	Inactive	491
TIM	HODGES	Inactive	491
LARRY	WINTERS	Inactive	255
LAWANDA	ANTHONY	Inactive	255
		Count: 5	Average: 372.8
Agent ID Status: Active			
MALINDA	PRESTON	Active	237
NICHOLAS	MILLER	Active	491
MARGUERITE	MCLAUGHLIN	Active	237
KRISTINE	CONTRERAS	Active	237
MARI	KEMP	Active	491
		Count: 5	Average: 338.6
		Count: 10	Average: 355.7

8. Fields can be rearranged by dragging them to a different location within the same area. Fields cannot be moved between Column and Row areas in Summary Table reports – they must be removed and re-added directly from the Fields area. The Report Preview area updates based on changes in the Structure area.

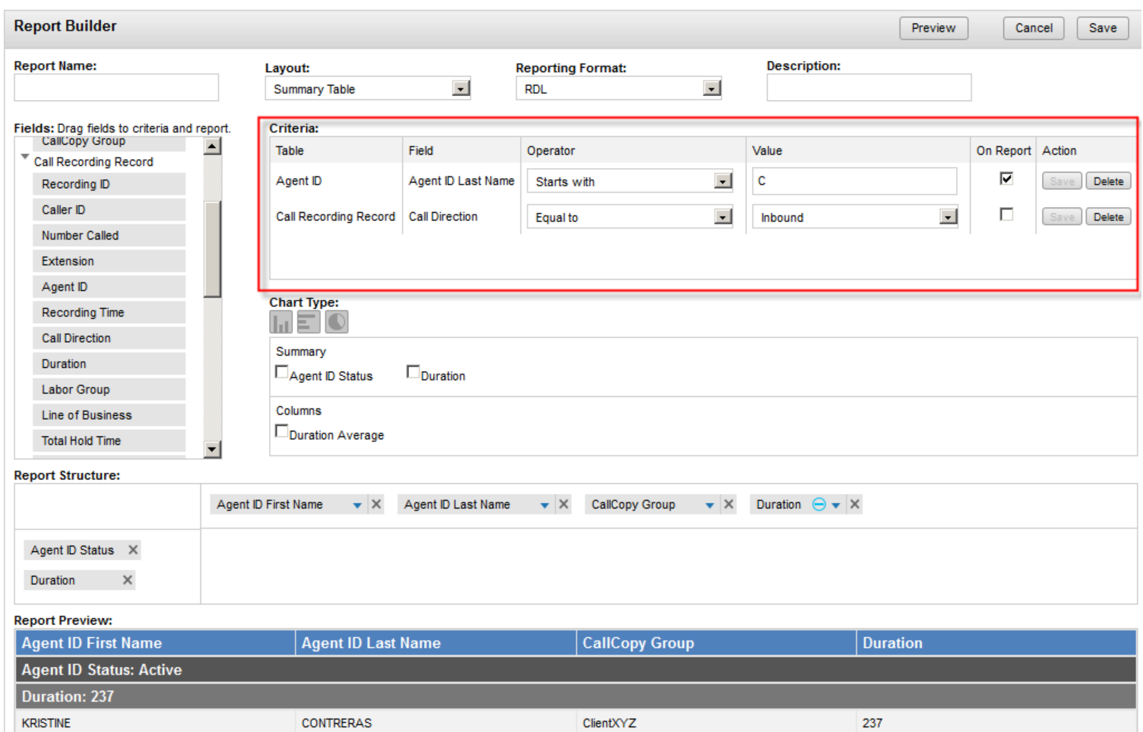
    Note In Internet Explorer 7 only:

    - The Report Builder area may resize briefly (shrink, then expand back to normal) when dragging the first field on an initial page load. This is strictly cosmetic and does not affect performance or functionality in any way.
    - In Summary Table layout, if three or more fields exist in the Row area in the report structure and a user clicks and drags a field to reorder them, the field will move into the space to the right while being dragged. In other browsers, the field stays within the Row area. Also, if the top-most field needs demoted below another field, the top-most field must be dragged out of position – in IE7, a field cannot be dragged into position above the top-most field.

9. From the Fields area, drag the desired fields to the **Criteria** area to filter what data is displayed on the report. A drop-down menu of relevant operators and a text entry field for the operator value or date selector appear for each data field. Operators include:

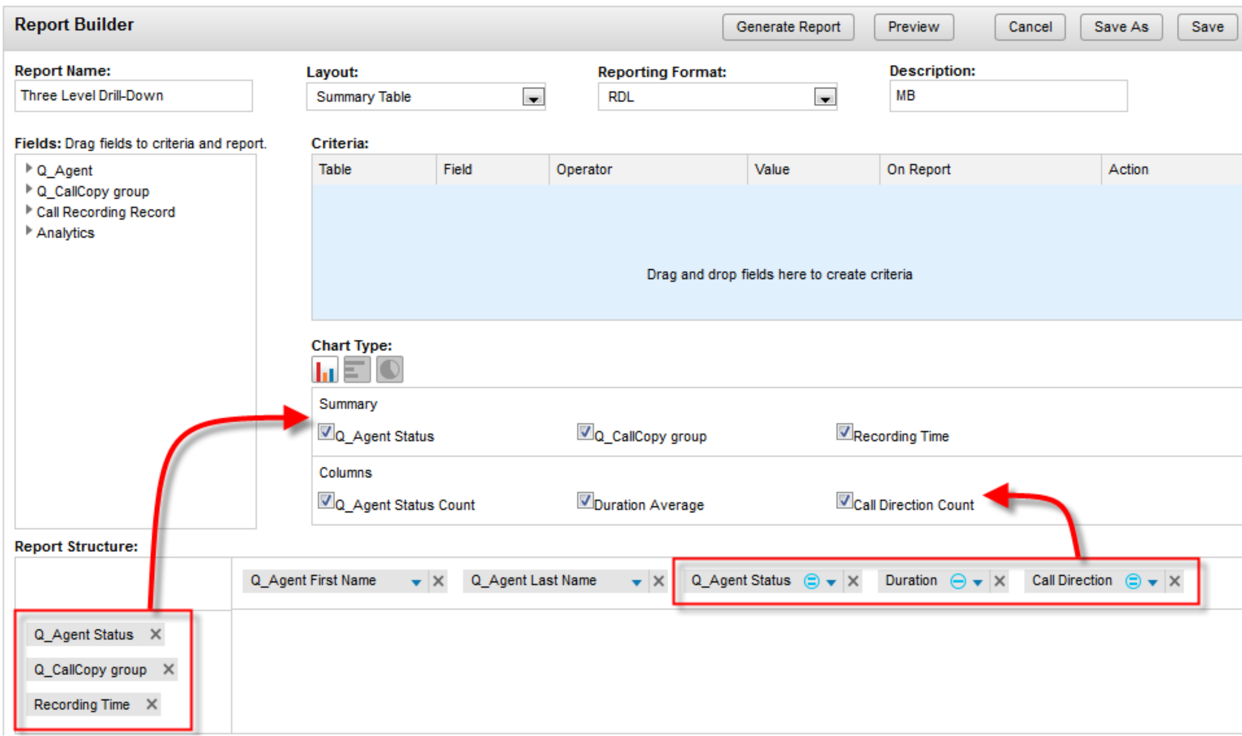
    - Less than
    - Greater than
    - Equal to
    - Not equal to
    - Less than or equal to
    - Greater than or equal to
    - Starts with
    - Ends with
    - Contains
    - Does not contain
    - In
    - Not in

    Select an operator and enter a value. Acceptable values depend on the data and data type (agent, date, record ID, etc.). Due to the limited number of possible values, certain data types like CallCopy Groups or Call Direction will have a drop-down list for acceptable values rather than a text field.

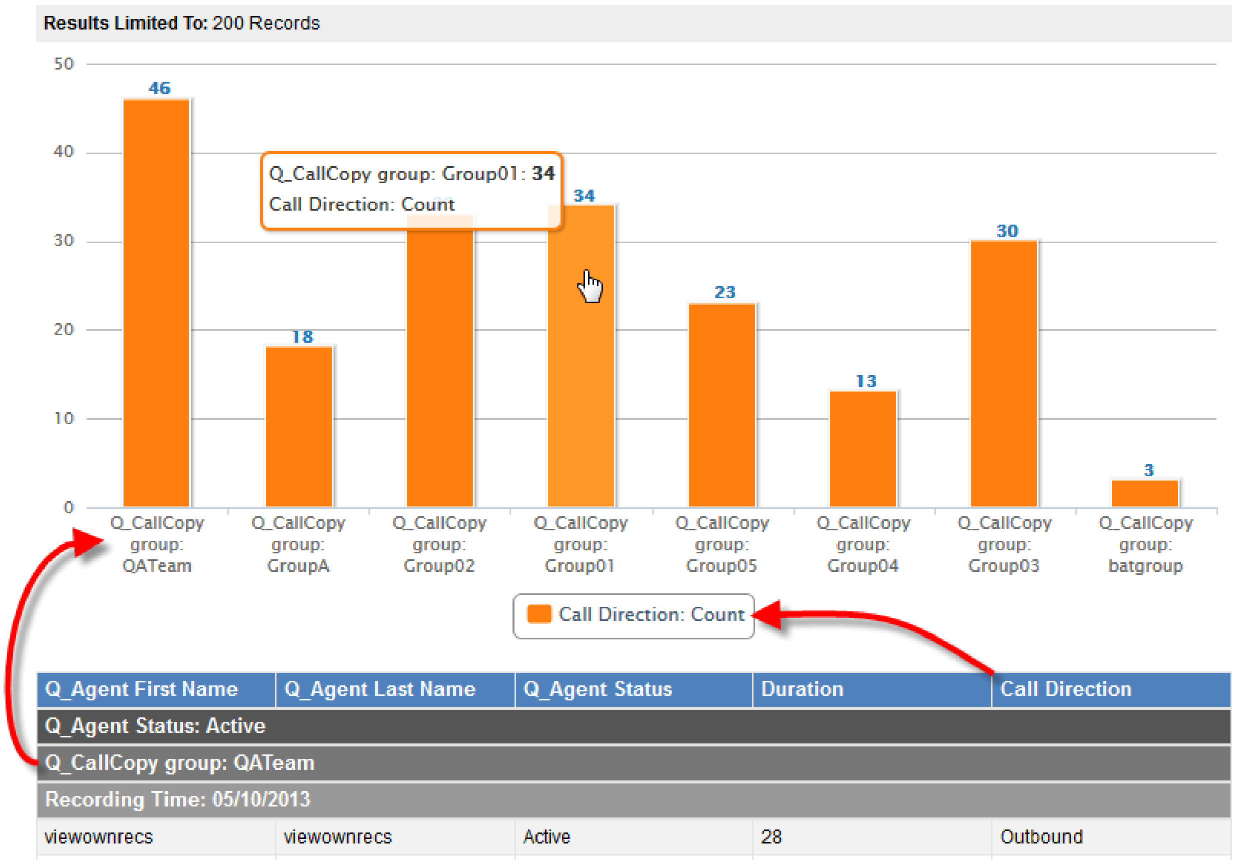


10. The **On Report** checkbox toggles whether a criterion is shown in the Report Criteria section of the rendered/printed report. Select this as needed.
11. On individual criteria, click **Save** to apply changes or update the report preview. Click **Delete** to remove a criterion.

12. If using the Summary Table layout, options for **Chart Type** are available. Under the Criteria area are buttons for vertical and horizontal bar charts, or a pie graph. Only icons for chart types that can be used with the chosen report type will be displayed (available icons appear in gray; a selected icon will be in color). Below that are fields that can be selected for display on the chart, depending on the data selected in the report. Fields in the Rows area appear under Chart Type > Summary, while choosing Column Average, Count, or Sum for Columns displays those values under Chart Type > Columns. For vertical and horizontal bar graphs, multiple data types on both columns and rows can be selected for display. For pie charts, only one entity in each of the Summary and Column areas may be selected.



13. Click **Preview** to see in a popup how the report will appear as it would be rendered.
14. If a chart was created with the report, it will appear in the Preview as well. HTML reports will allow interactive drill-down exploration of data by clicking on bars in the chart. If there are multiple detail levels, clicking through will loop back to the top level.



15. Click **Cancel** to return to editing the report in the Report Builder.
16. When finished creating the report, click **Save**. A dialog box opens, allowing changes to the report name, description, and whether to save the criteria used to make the report as public or private. The criteria used to generate the report are automatically saved with the report, so this option is only necessary if the saved criteria will be used to generate other reports in the future. Click **Save**.
17. If you wish to discard changes to the report, click **Cancel** instead. The system will return to the report type's landing page.

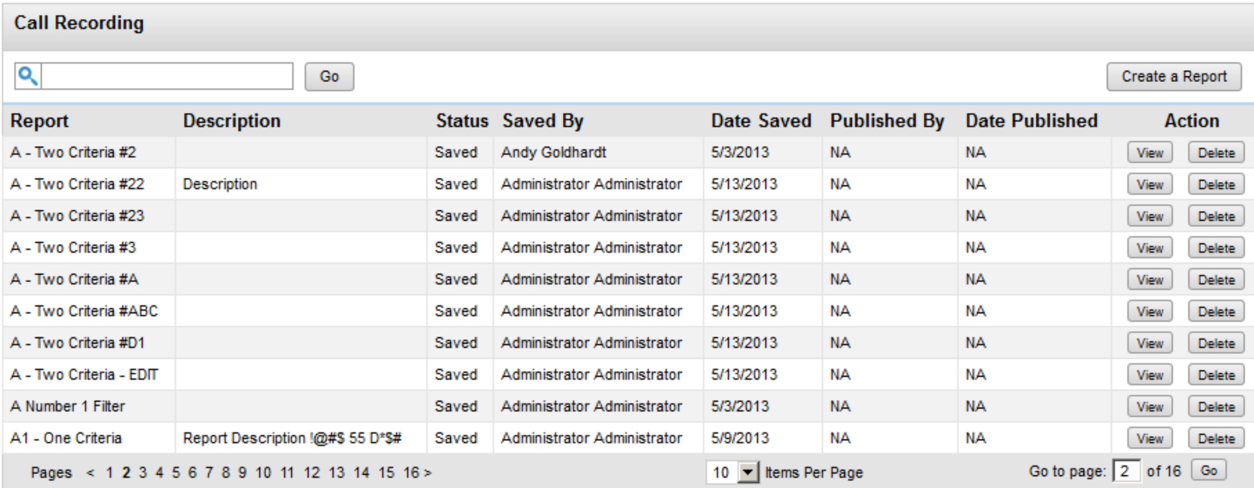
Edit Existing Ad Hoc Reports

Editing a saved ad hoc report can be used to:

- Change a report that is being developed and reviewed.
- Change a report that has been approved and used but requires changes to meet new or different information needs.
- Create a new report from an existing report.

The **Report Library** displays a list of reports, sorted alphabetically by report name. Visible content has been either created by the logged in user and set as Public or Private, or created by other users and shared as Public. The **Saved By** column displays the name of the last user to save changes to the report.

Reports can be located by entering a search word or phrase and clicking **Go**, or manually scrolling/paging through the list. Saved reports can be used as drafts for creating new reports or a workspace for analyzing data.


Call Recording

Go   Create a Report

Report	Description	Status	Saved By	Date Saved	Published By	Date Published	Action
A - Two Criteria #2		Saved	Andy Goldhardt	5/3/2013	NA	NA	View Delete
A - Two Criteria #22	Description	Saved	Administrator Administrator	5/13/2013	NA	NA	View Delete
A - Two Criteria #23		Saved	Administrator Administrator	5/13/2013	NA	NA	View Delete
A - Two Criteria #3		Saved	Administrator Administrator	5/13/2013	NA	NA	View Delete
A - Two Criteria #A		Saved	Administrator Administrator	5/13/2013	NA	NA	View Delete
A - Two Criteria #ABC		Saved	Administrator Administrator	5/13/2013	NA	NA	View Delete
A - Two Criteria #D1		Saved	Administrator Administrator	5/13/2013	NA	NA	View Delete
A - Two Criteria - EDIT		Saved	Administrator Administrator	5/13/2013	NA	NA	View Delete
A Number 1 Filter		Saved	Administrator Administrator	5/3/2013	NA	NA	View Delete
A1 - One Criteria	Report Description !@#$ 55 D*$#	Saved	Administrator Administrator	5/9/2013	NA	NA	View Delete

Pages < 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 >   10 Items Per Page   Go to page: 2 of 16 Go

To edit a report:

1. Under the Reporting/Reports tab, click Ad Hoc Reports, then the report type.
2. Locate the report to edit. Double-click on the report or click the **View** button at the right end of the report's row in the list. Saved reports can also be removed from the system here by clicking the report's **Delete** button. Deleting a report removes the saved report and all saved search criteria for the report.
3. Click **Edit**. A warning message will appear. Review the warning and click **Continue** to edit the report or **Cancel** to return to the Report Library.
4. Make the desired changes to the report, then click one of the following:

   - **Save** to update the existing report. If the name is changed, clicking Save updates the existing report with the new name. The option to save criteria for the report is not presented.
   - **Save As** to open the Save dialog box and create a new report. This will retain the original report and save the new one in a separate file. The report name must be unique. The dialog box presents options for saving report criteria as public or private. Click **OK** to commit changes or **Cancel** to return to the Report Builder.

   Note Editing an existing saved ad hoc report can cause saved report criteria to stop working. Consider using the **Save As** function to save a new version of the report to edit.

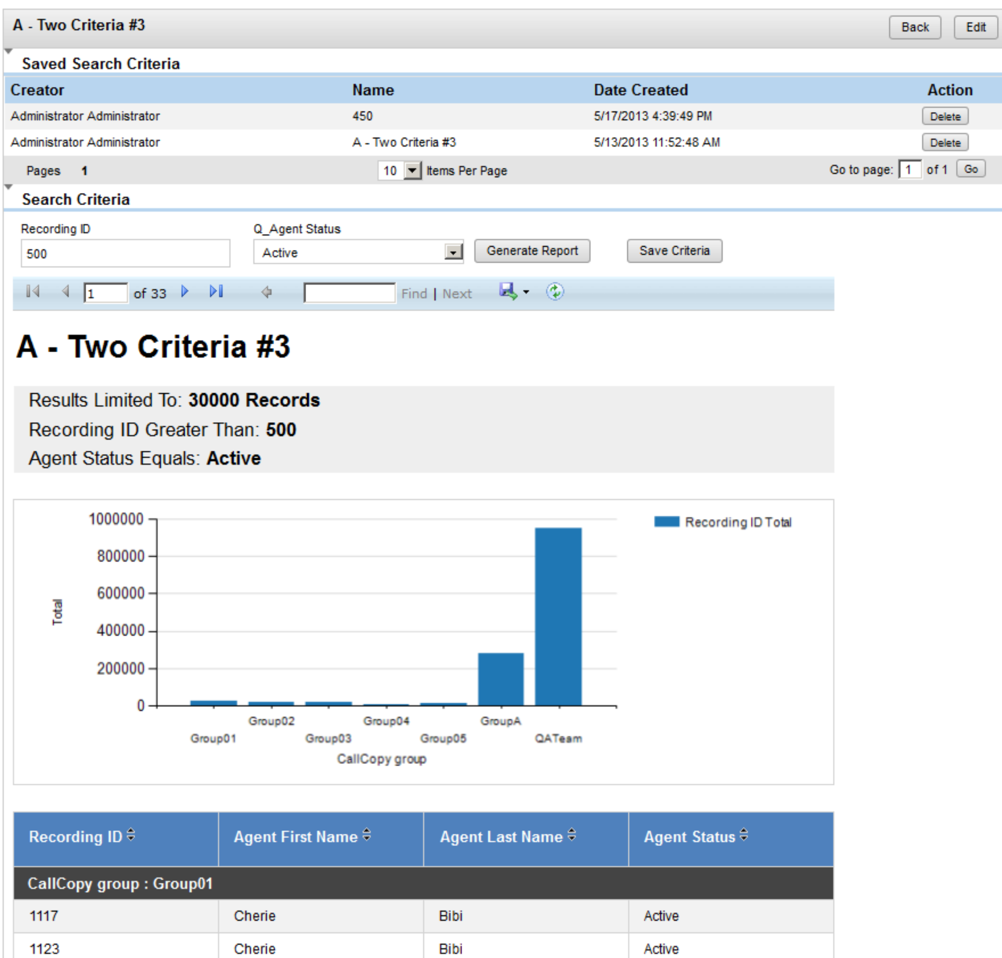
5. The system saves the report and returns the user to the Report Builder. Click **Cancel** to return to the Report Library. If a new report was saved, it now appears in the list.

Run an Ad Hoc Report

An ad hoc report can be re-run to create multiple iterations of that report using different search parameters (e.g., date ranges, user names). After saving a report, the **Generate Report** function becomes available. From the Report Builder, click the **Generate Report** button to go to the Generate Report page. Opening an existing report from the Report Library automatically goes to the Generate Report page.

In the **Search Criteria** section, the operator values (i.e., filters) of the criteria saved with the report can be modified. To add new criteria or change specific operators, the report must be manually edited and resaved. Enter the desired search criteria and click **Generate Report** to display the results on the screen with the report navigation and feature bar (see the "Printable-Report Functions" section for details). Columns in the report can be sorted by toggling the ascending/descending arrows in the column headers.

To modify which search criteria are available in the report, click **Edit**. Search criteria can also be saved (public or private) by setting filters to the desired values, then clicking **Save Criteria**. The named report criteria will appear in the **Saved Search Criteria** area. Double-click on a set of saved criteria in the list to apply it.



cc: Discover Report Types

Audit Reports

These entities and fields are used for Audit ad hoc reports. Fields under Export Audit and Audit Trail are explained in the "System Reports > Audit Report" section of this guide.

Notes

- If a Role is not assigned to any Users, it will not appear in a report showing User/Role assignments.
- Users associate with Roles and Groups, but Roles and Groups to not presently associate with one another. For instance, a report designed to list all the Roles associated with a CallCopy Group would produce inconsistent results, but listing the Roles or Groups associated with a User(s) would work as expected.

User

- **First Name**
- **Last Name**
- **Username**
- **Superuser:** Report displays as Yes or No. Search criteria values are All, Yes, No.
- **User Status:** Report displays as Active or Inactive. Equivalent to Agent Status.
- **Login Attempts:** Search criteria values are numbers.
- **Locked:** Report displays as Yes/No. Search criteria values are All, Yes, No.
- **User - Created On:** Search criterion displays a date selector.
- **User - Modified On:** Search criterion displays a date selector.
- **User - Modified By:** Search criterion displays a date selector.

Role

- **Role Name**
- **Role - Created On:** Search criterion displays a date selector.
- **Role - Created By**
- **Role - Modified On:** Search criterion displays a date selector.
- **Role - Modified By**

Permission

- **Permission:** Some permissions are currently represented by numbers rather than names.

Group

- **Group:** This is the CallCopy group name and can be assigned to a role or a user can be a member of a group.
- **Group Status:** Report displays as Active or Inactive. Search criteria values are All, Active, Inactive.

Export Audit

- **Exported File**
- **Record ID**
- **Export Type**
- **Export Time:** Search criterion displays a date selector.
- **Export Info**
- **User First Name**
- **User Last Name**
- **Username**

Audit Trail

- **Audit Event ID**
- **Audit Module:** Audit module name.
- **Audit Component**
- **Audit User:** Should be same as user first/last name.
- **Audit Time:** Search criterion displays a date selector.
- **IP Address:** Search criteria values must be in valid IP address format.
- **Numeric Message**
- **Message 1**
- **Message 2**
- **Message 3**

Call Recording Reports

These entities and fields are used for Call Recording ad hoc reports. Some terms are established on the Terminology Settings page detailed in the *cc: Discover Administration Manual*'s "Terminology" section.

Agent ID

- **Agent First Name**
- **Agent Last Name**
- **Agent Status:** Report displays as Active or Inactive. Search criteria values are All, Active, Inactive. Equivalent to User Status.

Group

- **Group:** This is the CallCopy group name.

Call Recording Record

- **Recording ID:** Search criterion accepts numbers only.
- **Caller ID (ANI):** Inbound caller number.
- **Number Called (DNIS):** Outbound called number.
- **Extension**
- **Agent ID** (Device Alias)
- **Recording Time:** Search criterion displays a date selector.

- **Call Direction:** Report displays as Inbound or Outbound. Search criteria values are Inbound, Outbound, Inbound or Outbound, Unknown Only. The database allows for blank fields and question marks (?) to indicate unknown direction.
- **Duration:** In seconds.
- **Labor Group:** This is the ACD/Switch Group.
- **Line of Business**
- **Total Hold Time:** In seconds.
- **User1-15:** The names of these fields are defined in the Web Portal's Terminology page. The values they store are determined by the customer's environment and configuration.

Analytics

- **Analytic Tag**
- **Tag Present:** Report displays Yes (tag present) or No (tag not present). Search criteria values are Yes, No, Both.

Quality Assurance Reports

For the QA data in ad hoc reporting, there is QA Form data and Completed QA data. It is important **NOT** to mix these data. Mixing them can pull data that is not accurate or logical. In general, QA reporting can serve two purposes:

- Reporting on available QA Forms (QA Form, Sections, Questions and available responses).
- Reporting on Completed QA Forms, which is what the vast majority of our existing reports provide.

Reporting on either of these through a single interface is difficult because this data has different meanings and is linked together depending on context. To help support both of these cases, keep the following in mind when building reports:

- In the reporting interface, **QA Sections** will relate to the instance of the QA Form. In turn, QA Questions will then relate to sections, and responses will relate to questions.
- On the interface, reporting from **QA Evaluation Form**, **QA Evaluation Form Section**, **QA Evaluation Question**, and **QA Responses** will allow reports to be created that deal only with the instances of the form.
- On the reporting interface, **Completed QA Response** is intended to be used to represent information relating to a completed form.

Because this data can be used differently depending on context, reporting on information within **Completed QA Response** with **QA Evaluation Question**, **QA Response**, or **QA Section** may yield inconsistent or unexpected results.

These entities and fields are used for QA ad hoc reports.

Evaluator

- **Evaluator First Name**
- **Evaluator Last Name**
- **Evaluator Status:** Report displays as Active or Inactive. Search criteria values are All, Active, Inactive.

Agent ID

- **Agent First Name**
- **Agent Last Name**
- **Agent ID Status:** Report displays as Active/Inactive. Search criteria values are All, Active, Inactive. Equivalent to User Status.

Call Recording Record

- **Recording ID:** Search criteria values are numbers only.
- **Caller ID (ANI):** Inbound caller number.
- **Number Called (DNIS):** Outbound called number.
- **Extension**
- **Agent ID** (Device Alias)

Group

- **Group:** This is the CallCopy group name.

QA Evaluation Form

- **Form Name**
- **Acknowledgement Required:** Report displays as Yes/No. Search criteria values are Yes, No, All.
- **Create Date:** Search criterion displays a date selector.
- **Status:** Report displays as Active, Inactive. Search criteria values are Active, Inactive, All.
- **Disable Date:** Search criterion displays a date selector.

QA Evaluation Form Section

- **Section Order:** Search criteria values are whole numbers.
- **Section Name**

QA Evaluation Question

- **Form Question**
- **Question Order:** Search criteria values are whole numbers.
- **Priority:** Report displays as Normal, Critical. Search criteria values are All, Normal, Critical.
- **Possible Score:** Search criteria values are numbers.

QA Response

- **Response Order:** Search criteria validation: whole number.
- **Available Response**
- **Auto Fail:** Report displays as No, Yes-Section, Yes-Form. Search criteria values are display values and All.
- **Response Score:** Search criteria values are numbers.
- **NA:** Report displays as NA. Search criteria values are Yes, No, All.

Completed QA Evaluation

- **Evaluation ID:** Search criteria values are numbers.
- **Date Completed:** Search criterion displays a date selector.
- **Total Form Possible Score:** Search criteria values are numbers.
- **Total Actual Score:** Search criteria values are numbers.
- **Acknowledgement Status:** Report displays as Unacknowledged, Acknowledged. Search criteria values are displays and All.
- **Notes**

Completed QA Response

- **Completed Question**
- **Question Response**
- **Score:** Search criteria values are numbers.
- **Possible Score:** Search criteria values are numbers.

Content Library Items

- **Library Item:** This can be displayed per agent and per group.
- **Acknowledged Date:** This is per agent.

Completed Survey Form

- **Survey Name**
- **Status:** Report displays as Not Started, Incomplete, Complete, Taken. Search criteria values are display values and All.
- **Completed Survey ID:** Search criteria values are numbers.
- **Survey Possible Value:** Search criteria values are numbers.
- **Survey Value:** Search criteria values are numbers.

Survey Reports

These entities and fields are used for Survey ad hoc reports. Survey-call record linking must be configured for the Agent and Call Recording data to appear in the database. Survey Form Status appears differently in ad hoc reporting than it does elsewhere. In the rest of the Web Portal, survey form statuses appear as Active, In Progress, and Disabled. Data pulled from the database for ad hoc reporting appears as Not Started, Incomplete, Complete, and Taken. This may provide inconsistent results.

Form

- **Form**
- **Form Status:** Report displays as Active, Disabled. Search criteria are display values and All.
- **Negative Threshold:** Minimum percentage threshold. Search criteria values are numbers.
- **Positive Threshold:** Maximum percentage threshold. Search criteria values are numbers.
- **Section**

Question

- **Question**
- **Question Type:** Search criteria values are Present Question and Wait for Result, Collect Customer Information, Collect Digits, End Survey, Transfer, Skip, and All.
- **Hide No-Data Response:** Search criteria values are Yes, No, All.

Response

- **Response**
- **Response Possible Value**
- **Actual Response**
- **Response Recording Name**

Completed Survey

- **Completed Survey ID:** Search criteria values are numbers.
- **Duration:** Search criteria values are minutes.
- **Survey Date:** Search criterion displays a date selector.
- **Number Called (DNIS):** Outbound called number.
- **Caller ID (ANI):** Inbound caller number.
- **Survey Possible Value:** Search criteria values are numbers.
- **Survey Value:** This is the actual score. Search criteria values are numbers.
- **Survey Complete:** Report displays as Yes, No. Search criteria values are Yes, No, All.

Call Recording

- **Call Recording ID:** Search criteria values are numbers.

Agent ID

- **Agent ID First Name**
- **Agent ID Last Name**
- **Phone ID**
- **Agent ID Status:** Report displays as Active or Inactive. Search criteria values are All, Active, Inactive. Equivalent to User Status.
- **Group**
- **Group Status:** Report displays as Active/Inactive. Search criteria values are All, Active, Inactive.

cc: Clarity Report Types

Note: The Clarity database stores dates and times in UTC (Coordinated Universal Time), the primary time standard by which the world regulates clocks and time. The Clarity Web Portal often adjusts these fields to the user's time, but ad hoc reports show the date/time fields in UTC. For this reason, you may notice differences between ad hoc reports and what you see in Clarity's user interface.

ACD Call and Agent Data Reports

These entities and fields are used for cc: Clarity ACD Call and Agent Data Ad Hoc Reports. ACD Agent/Split and Agent data can be used to calculate AHT, Occupancy/Utilization, etc.

ACD Split Call Data

- **Call Volume Date/Time:** Search criterion displays a date selector.
- **Split**
- **Device:** Related via split to device name.
- **Interval Seconds:** Time interval for which data was pulled (e.g., 3600 seconds = 1 hour).
- **Offered Calls:** Search criteria values are numbers.
- **Answered Calls:** Search criteria values are numbers.
- **Service Level Calls:** Number of calls that met the SLA. Search criteria values are numbers.
- **Abandoned Calls:** Search criteria values are numbers.
- **Abandon Seconds:** Total time in seconds that abandoned calls were on hold before caller hung up.

ACD Agent/Split Call Data

- **Agent**
- **Split**
- **Call Volume Date/Time:** Search criterion displays a date selector.
- **Interval Seconds:** Time interval for which data was pulled (e.g., 3600 seconds = 1 hour).
- **Answered Calls:** Search criteria values are numbers.
- **Hold Calls:** Search criteria values are numbers.
- **Ring Calls:** Search criteria values are numbers.
- **Customer Seconds:** Talk time in seconds.
- **Hold Seconds:** Search criteria values are numbers.
- **ACW Seconds:** Time spend on after-call work. Search criteria values are numbers.

ACD Agent Data

- **Agent**
- **Call Volume Date/Time**
- **Interval Seconds:** Time interval for which data was pulled (e.g., 3600 seconds = 1 hour).
- **Logged in Seconds:** Seconds logged into the ACD. Search criteria values are numbers.
- **Available Seconds:** Seconds available to take calls. Search criteria values are numbers.
- **Inactive Seconds:** Seconds in inactive modes (e.g., lunch, break, training). Search criteria values are numbers.

Skill

- **Skill**

Labor Unit

- **Labor Unit**

User

- **User ID**

Team

- **Team**
- **Team Supervisor**

Service Level

- **SL Waiting Time**
- **SL Percent Calls Answered**

Agent Leave/PTO Reports

These entities and fields are used for Agent Leave/PTO ad hoc reports.

Leave Requests

- **Leave Type**
- **Date Created**
- **Start Date**
- **End Date**
- **Comment**
- **Status**
- **Approved By**

Agent

- **Agent**
- **Location**

Team

- **Team**
- **Team Supervisor**

Labor Unit

- **Labor Unit**

Skill

- **Skill**

Shift Reports

These entities and fields are used for Shift ad hoc reports.

Shift

- **Agent:** User ID
- **Shift Start:** Search criterion displays a date selector.
- **Shift End:** Search criterion displays a date selector.
- **Activity:** Lunch, meeting, training, break, etc.
- **Activity Start:** Search criterion displays a date selector.
- **Activity End:** Search criterion displays a date selector.
- **Is Paid:** True or false.
- **Late Threshold:** Search criteria values are numbers.

Labor Unit

- **Labor Unit**

Skill

- **Skill**

Team

- **Team**
- **Team Supervisor**

Sample Reports

This section explains how to generate a variety of reports using the ad hoc Report Builder. These are meant to give users an idea of the flexibility and types of reports that ad hoc can create, but is by no means an all-inclusive list.

Audit Report > Superuser

This report lists which users have superuser permission.

Columns	Rows	Criteria	Operator	Criteria Value
User > Username User > Last Name User > First Name User > Superuser	User > User Status	User > Superuser	Equal To	Yes

Audit Report > Modified Users

This report lists which users have been modified in the last 24 hours.

Columns	Rows	Criteria	Operator	Criteria Value
User > Username User > Last Name User > First Name	N/A	User > Modified On	Greater Than	[Yesterday's Date]

Audit > Group Membership

Predefined reports show the agents within a group. This example will allow viewing by groups assigned to an agent instead.

Columns	Rows	Criteria	Operator	Criteria Value
Group > Group	User > Username	User > Username	Equal To	[Username]

Audit > User Role Assignments

Shows the roles assigned to active users whose accounts are not locked.

Columns	Rows	Criteria	Operator	Criteria Value
Users > Username Users > Last Name Users > First Name Users > Role Name	N/A	Users > User Status Users > Locked	Equal To Equal To	Active No

Audit > Role: Permissions

There is currently no predefined report in cc: Discover that provides this information. It displays what permissions are assigned to which roles.

Columns	Rows	Criteria	Operator	Criteria Value
Permission > Permission	Role Name	N/A	N/A	N/A

Call Recordings > User Fields

If custom user fields are utilized, this report would relate that data to specific call records. For example, if order numbers or account numbers are linked to recording IDs, the following settings would display that data. Filters can be added to limit results. This type of report may be useful in environments using On-Demand and cc: Fusion.

Columns	Rows	Criteria	Operator	Criteria Value
Call Recording Record > Recording ID Call Recording Record > [custom user field]	N/A	N/A	N/A	N/A

Call Recordings > Total Hold Time

For integrations that track hold time, this report would display hold time per calls, and could total or average the hold time across a range of filtered call records.

Columns	Rows	Criteria	Operator	Criteria Value
Agent ID > Last Name Agent ID > First Name Call Recording Record > Recording ID Call Recording Record > Duration Call Recording Record > Total Hold Time Call Recording Record > Caller ID (ANI)	N/A	N/A	N/A	N/A

Call Recordings > Calls from Particular Area Codes

This could help locate areas with high incoming call volumes for strategic purposes.

Columns	Rows	Criteria	Operator	Criteria Value
Agent ID > Last Name Agent ID > First Name Call Recording Record > Recording ID Call Recording Record > Duration Call Recording Record > Caller ID (ANI)	N/A	Call Recording Record > Caller ID (ANI)	Starts With	[Area Code]

Quality Assurance > Agent QA Summary

A predefined report like this exists, but now additional fields can be added, such as the name of the evaluator. This allows comparison of evaluation scores on the same form if both were done on the same recording.

Columns	Rows	Criteria	Operator	Criteria Value
Completed QA Evaluation > Evaluation ID Evaluator > Evaluator Last Name Evaluator > Evaluator First Name Agent ID > Agent Last Name Agent ID > Agent First Name QA Evaluation Form > Form Name Completed QA Evaluation > Total Form Possible Score Completed QA Evaluation > Total Actual Score	Recording ID	N/A	N/A	N/A

Quality Assurance > QA Score and Survey Score Comparison

Allows comparing QA scores to survey scores for a given Recording ID.

Columns	Rows	Criteria	Operator	Criteria Value
Completed QA Evaluation > Evaluation ID Agent ID > Agent Last Name Agent ID > Agent First Name Completed QA Evaluation > Total Form Possible Score Completed QA Evaluation > Total Actual Score Completed Survey Form > Survey Possible Value Complete Survey Form > Survey Value	Recording ID	N/A	N/A	N/A

Quality Assurance > QA Form Score Relation to Library Items/Training

This can be useful in determining how effective training and resource materials are for improving agents' QA scores.

Columns	Rows	Criteria	Operator	Criteria Value
Completed QA Evaluation > Evaluation ID Completed QA Evaluation > Date Completed Agent ID > Agent Last Name Agent ID > Agent First Name QA Evaluation Form > Form Name Completed QA Evaluation > Total Form Possible Score Completed QA Evaluation > Total Actual Score Content Library Items > Library Item Content Library Items > Acknowledged Date	Recording ID	Content Library Items > Library Item	Equal To	[File Name]

Survey > Call Recording/Agent/Survey Score

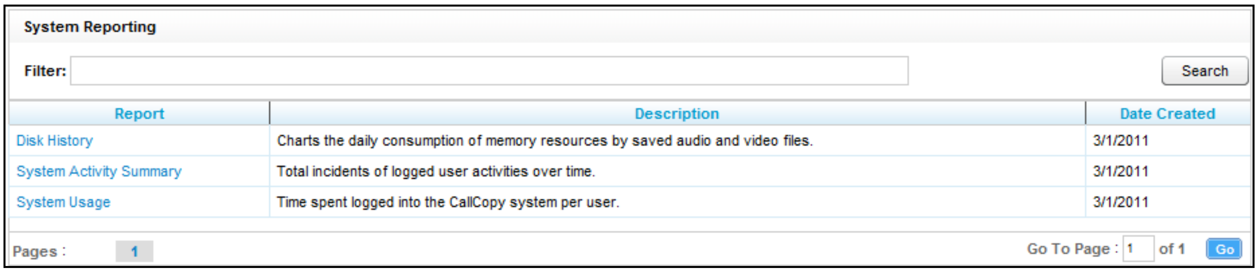
There are currently no predefined reports that show call recording linking to surveys. Building the following report shows that.

Columns	Rows	Criteria	Operator	Criteria Value
Call Recording > Call Recording ID Agent ID > Agent Last Name Agent ID > Agent First Name Completed Survey > Completed Survey ID Completed Survey > Survey Date Completed Survey > Survey Possible Value Completed Survey > Survey Value	N/A	N/A	N/A	N/A

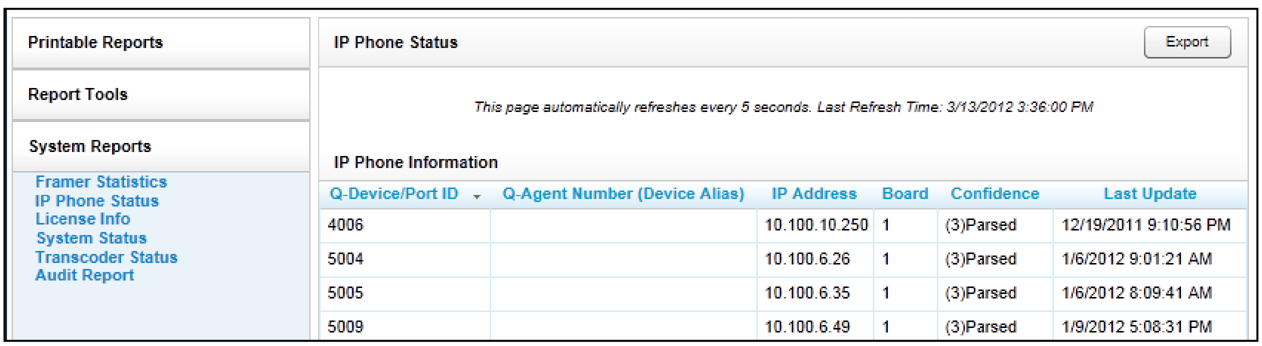
System Reports

Overview of System Reporting

The Printable Reports' System Reporting section provide historical data that relates to the usage of the cc: Discover software and the status of the system and software.

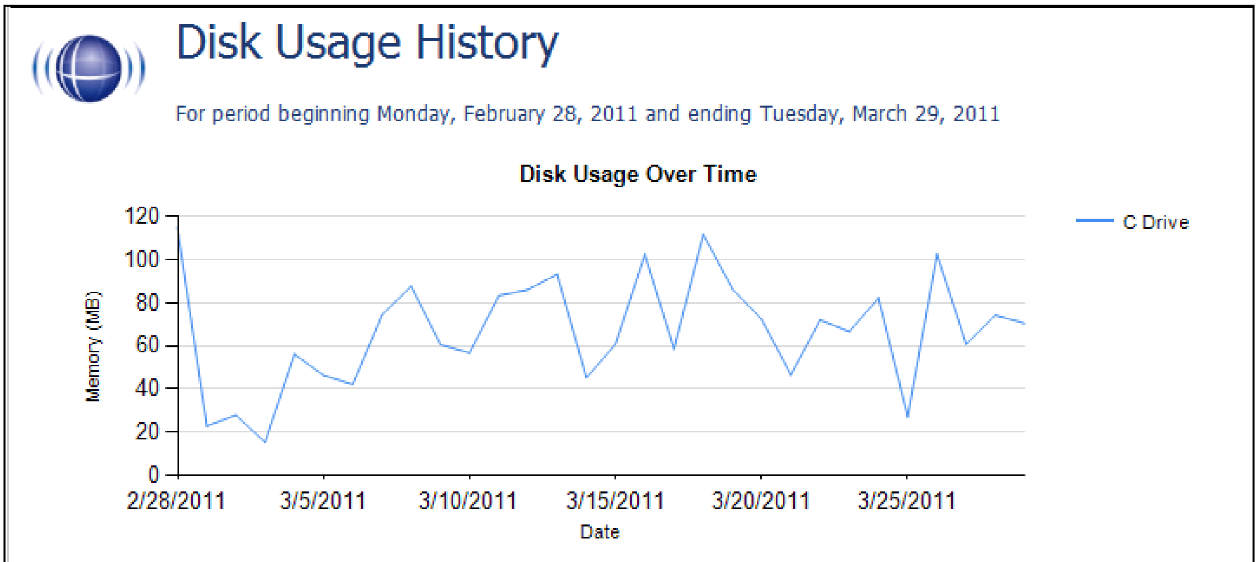


The **System Reports** menu provides non-printable reports, which have data that is not suited for printing or exporting. These reports are usually interactive or providing real-time updates to the user.



Disk History

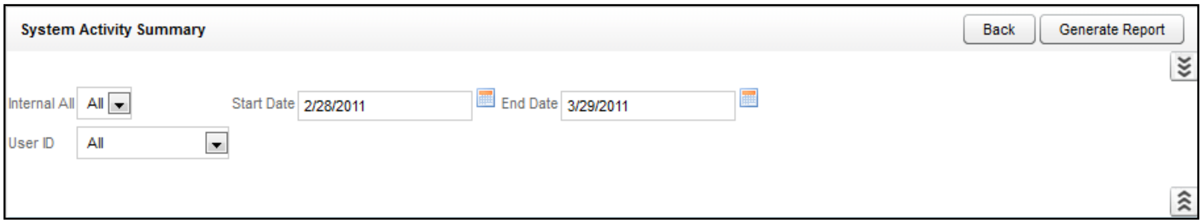
The Disk Usage History Report Displays the historical disk usage in MB for recording data over a range of days defined by the user. The results are displayed in both line chart and list format. Multiple drives are distinguished by lines.

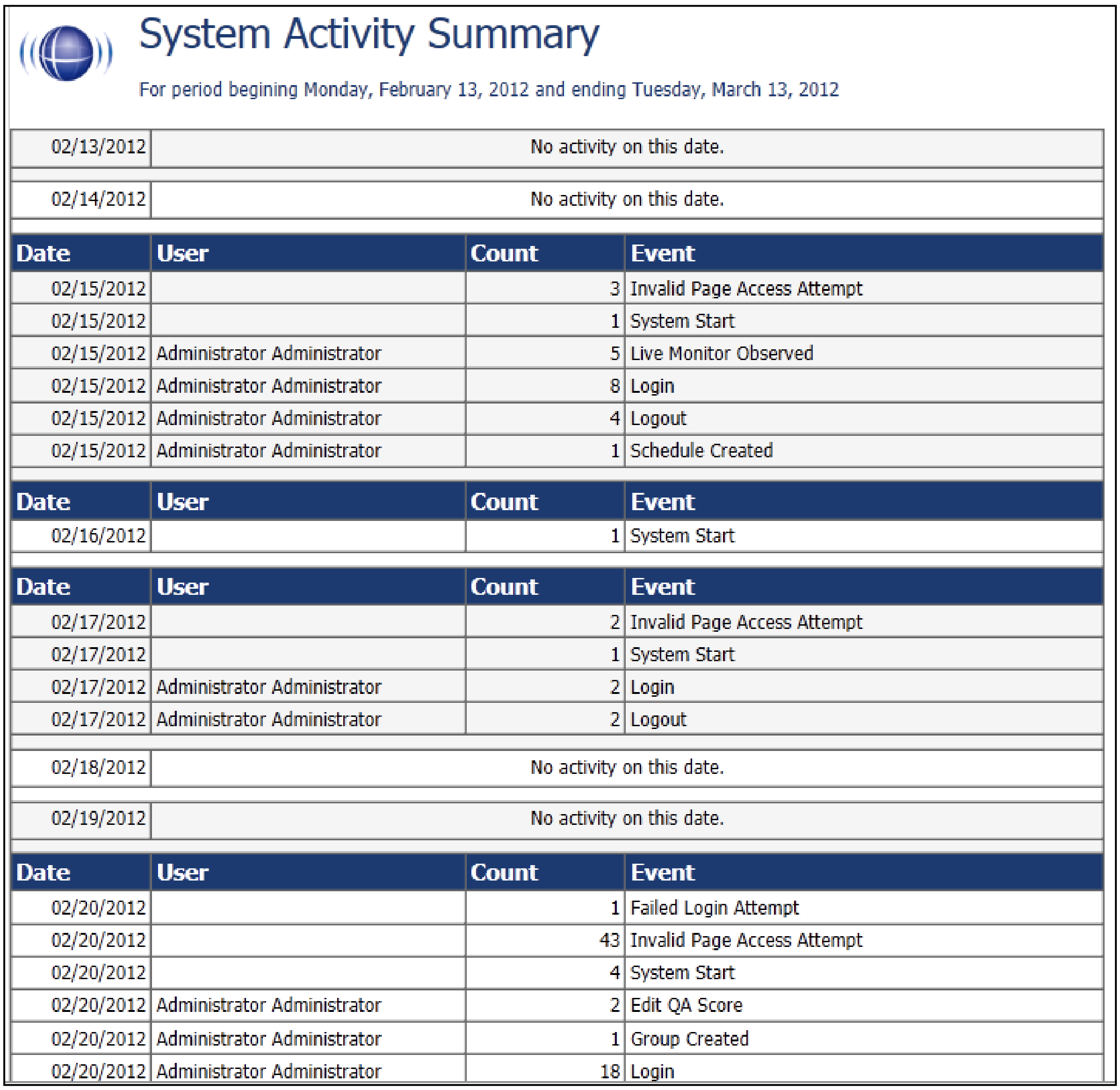


Date	Type	Drive	Disk Usage
02/28/2011	Audio	C	7.18 MB
02/28/2011	Video	C	108.12 MB
03/01/2011	Audio	C	1.85 MB
03/01/2011	Video	C	20.97 MB
03/02/2011	Audio	C	3.01 MB
03/02/2011	Video	C	24.89 MB
03/03/2011	Audio	C	1.09 MB
03/03/2011	Video	C	14.22 MB
03/04/2011	Audio	C	4.67 MB

System Activity Summary

The System Activity Summary Report displays what actions a specified user performed in the CallCopy system during a given date range. The report is separated with a different section for each date in the range selected that has activity. Actions such as login/logout, call playback, call deletes, and QA functions are all tracked with this report.





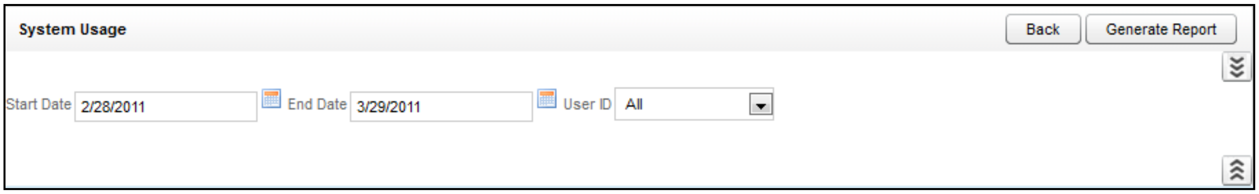
System Activity Summary

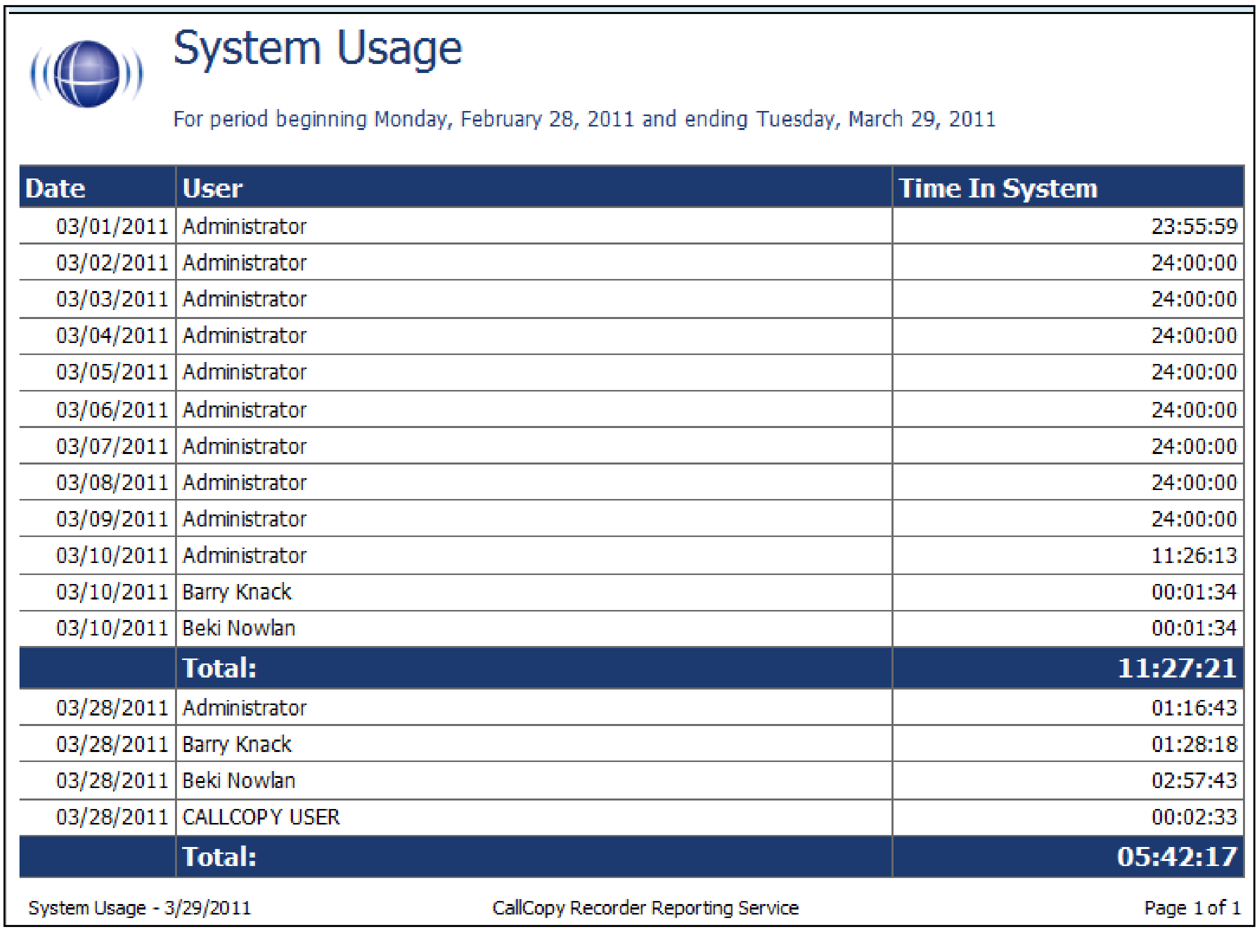
For period begining Monday, February 13, 2012 and ending Tuesday, March 13, 2012

Date	User	Count	Event
02/13/2012	No activity on this date.		
02/14/2012	No activity on this date.		
02/15/2012		3	Invalid Page Access Attempt
02/15/2012		1	System Start
02/15/2012	Administrator Administrator	5	Live Monitor Observed
02/15/2012	Administrator Administrator	8	Login
02/15/2012	Administrator Administrator	4	Logout
02/15/2012	Administrator Administrator	1	Schedule Created
02/16/2012		1	System Start
02/17/2012		2	Invalid Page Access Attempt
02/17/2012		1	System Start
02/17/2012	Administrator Administrator	2	Login
02/17/2012	Administrator Administrator	2	Logout
02/18/2012	No activity on this date.		
02/19/2012	No activity on this date.		
02/20/2012		1	Failed Login Attempt
02/20/2012		43	Invalid Page Access Attempt
02/20/2012		4	System Start
02/20/2012	Administrator Administrator	2	Edit QA Score
02/20/2012	Administrator Administrator	1	Group Created
02/20/2012	Administrator Administrator	18	Login

System Usage

The System Usage report displays the total time a user was logged into the system based on the time range given in the report options.





System Usage

For period beginning Monday, February 28, 2011 and ending Tuesday, March 29, 2011

Date	User	Time In System
03/01/2011	Administrator	23:55:59
03/02/2011	Administrator	24:00:00
03/03/2011	Administrator	24:00:00
03/04/2011	Administrator	24:00:00
03/05/2011	Administrator	24:00:00
03/06/2011	Administrator	24:00:00
03/07/2011	Administrator	24:00:00
03/08/2011	Administrator	24:00:00
03/09/2011	Administrator	24:00:00
03/10/2011	Administrator	11:26:13
03/10/2011	Barry Knack	00:01:34
03/10/2011	Beki Nowlan	00:01:34
	Total:	**11:27:21**
03/28/2011	Administrator	01:16:43
03/28/2011	Barry Knack	01:28:18
03/28/2011	Beki Nowlan	02:57:43
03/28/2011	CALLCOPY USER	00:02:33
	Total:	**05:42:17**

System Usage - 3/29/2011 CallCopy Recorder Reporting Service Page 1 of 1

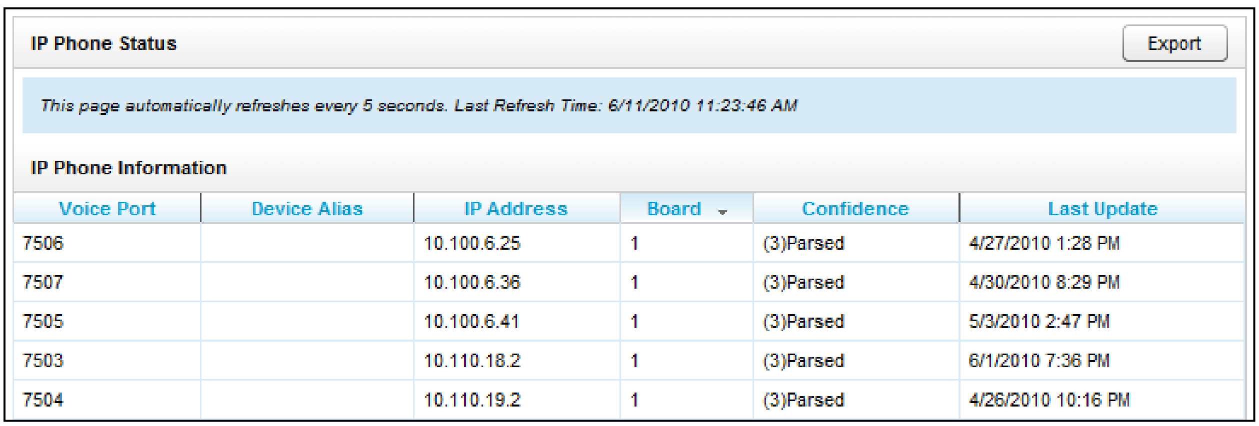
Framer Statistics

This report is only for analog and digital installs, not VoIP (e.g. deployments using AI-Logix voice boards). The report shows voltage level on each channel and line-side errors, which can indicate problems connecting with the phone. Those problems can affect or prevent call recording.

IP Phone Status

The IP Phone Status Report shows the status of all IP phones detected on the network for Passive VoIP integrations. The report list shows the device extension number, the IP address of the device, the Voice Board number the device was detected by, the confidence level of the detection, and the date/time the device was detected on the network. This report is useful when verifying that all phones are ready to be recorded on the network. The report auto-updates the list every 5 seconds and can also be exported into a CSV file by clicking the **Export** button at the top-right of the report. Confidence indicates cc: Discover's certainty that the Voice Port is actually assigned to the IP address. Confidence can be

- 1 No
- 2 Best Guess
- 3 Parsed – Somewhat confident. A cc: Discover script has detected the port value based on agent's entry of digits when logging into the phone.
- 4 Phone Registered – Very confident. The telephony system has provided the Port/Address combination to cc: Discover.
- Static Entry – The Port/Address has been entered on the cc: Discover Administration tab's IP Phone list.



IP Phone Status

Export

This page automatically refreshes every 5 seconds. Last Refresh Time: 6/11/2010 11:23:46 AM

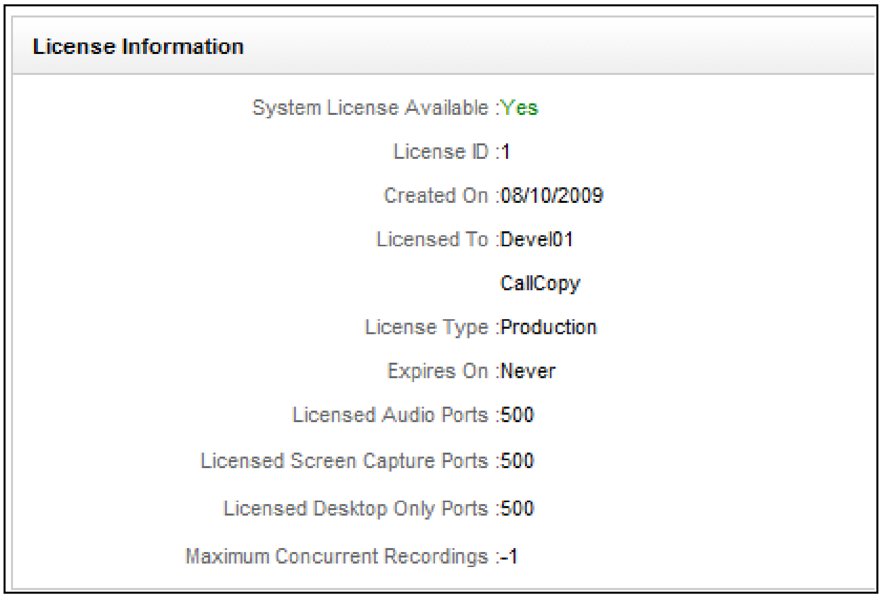
IP Phone Information

Voice Port	Device Alias	IP Address	Board	Confidence	Last Update
7506		10.100.6.25	1	(3)Parsed	4/27/2010 1:28 PM
7507		10.100.6.36	1	(3)Parsed	4/30/2010 8:29 PM
7505		10.100.6.41	1	(3)Parsed	5/3/2010 2:47 PM
7503		10.110.18.2	1	(3)Parsed	6/1/2010 7:36 PM
7504		10.110.19.2	1	(3)Parsed	4/26/2010 10:16 PM

License Info

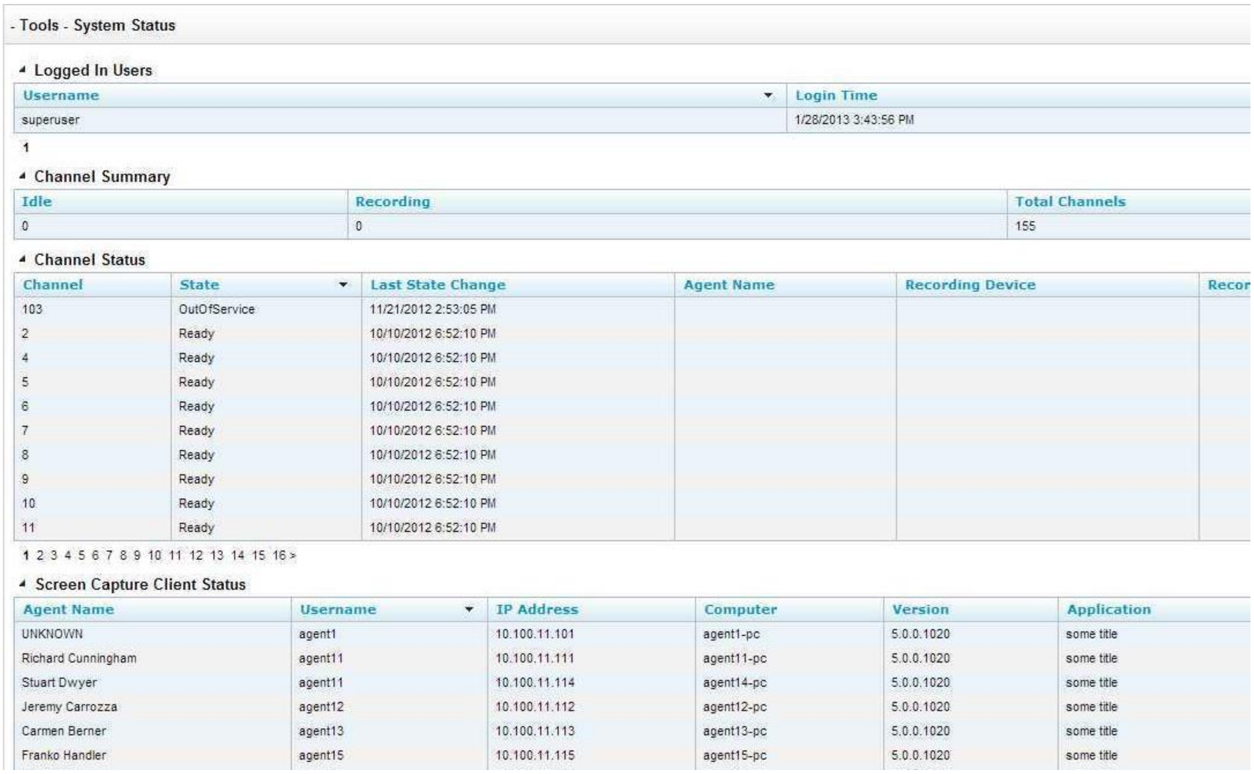
The License Information report shows in real time if the system is currently licensed for recording. It displays the License ID number, the date the license was issued, the expiration date, and the number of channels the system is licensed for.

This report shows licenses for the Web Portal server. It does not check licenses on recording cores on multiple servers.



System Status

This report shows the current call channel and agent activity on the system. This information is useful when investigating why users are logged in but not recording.



- Tools - System Status

Logged In Users

Username	Login Time
superuser	1/28/2013 3:43:56 PM

1

Channel Summary

Idle	Recording	Total Channels
0	0	155

Channel Status

Channel	State	Last State Change	Agent Name	Recording Device	Recor
103	OutOfService	11/21/2012 2:53:05 PM			
2	Ready	10/10/2012 6:52:10 PM			
4	Ready	10/10/2012 6:52:10 PM			
5	Ready	10/10/2012 6:52:10 PM			
6	Ready	10/10/2012 6:52:10 PM			
7	Ready	10/10/2012 6:52:10 PM			
8	Ready	10/10/2012 6:52:10 PM			
9	Ready	10/10/2012 6:52:10 PM			
10	Ready	10/10/2012 6:52:10 PM			
11	Ready	10/10/2012 6:52:10 PM			

1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 >

Screen Capture Client Status

Agent Name	Username	IP Address	Computer	Version	Application
UNKNOWN	agent1	10.100.11.101	agent1-pc	5.0.0.1020	some title
Richard Cunningham	agent11	10.100.11.111	agent11-pc	5.0.0.1020	some title
Stuart Dwyer	agent11	10.100.11.114	agent14-pc	5.0.0.1020	some title
Jeremy Carrozza	agent12	10.100.11.112	agent12-pc	5.0.0.1020	some title
Carmen Berner	agent13	10.100.11.113	agent13-pc	5.0.0.1020	some title
Franko Handler	agent15	10.100.11.115	agent15-pc	5.0.0.1020	some title

Transcoder Status

The Transcoder Status report gives a near real-time display of what audio files are being processed by the Transcoder module. The list displays the last 10 Completed and Failed records, and will display any records that are in progress at the time the report is run. This is useful in verifying the proper operation of the Transcoder. The Source files are the raw audio files, and the Destination lists the files that have been successfully transcoded.

Transcoder Status

This page automatically refreshes every 5 seconds. Last Refresh Time: 6/11/2010 11:29:00 AM

Completed Records

Identity	Source	Destination	Queued Time	Last Update Time
102866	E:\Recordings\20100611 \7536\7536-11-19-24.cca	E:\Recordings\20100611 \7536\7536-11-19-24.wav	6/11/2010 11:20:36 AM	6/11/2010 11:20:38 AM
102864	E:\Recordings\20100611 \7536\7536-11-09-12.cca	E:\Recordings\20100611 \7536\7536-11-09-12.wav	6/11/2010 11:17:06 AM	6/11/2010 11:17:13 AM
102861	E:\Recordings\20100611 \7504\7504-11-08-23.cca	E:\Recordings\20100611 \7504\7504-11-08-23.wav	6/11/2010 11:12:18 AM	6/11/2010 11:12:20 AM
102860	E:\Recordings\20100611 \5707\5707-11-11-05.cca	E:\Recordings\20100611 \5707\5707-11-11-05.wav	6/11/2010 11:12:12 AM	6/11/2010 11:12:13 AM
102859	E:\Recordings\20100611 \7517\7517-11-11-21.cca	E:\Recordings\20100611 \7517\7517-11-11-21.wav	6/11/2010 11:11:56 AM	6/11/2010 11:11:56 AM
102858	E:\Recordings\20100611 \7517\7517-11-07-13.cca	E:\Recordings\20100611 \7517\7517-11-07-13.wav	6/11/2010 11:07:50 AM	6/11/2010 11:07:50 AM
102857	E:\Recordings\20100611 \7502\7502-11-06-40.cca	E:\Recordings\20100611 \7502\7502-11-06-40.wav	6/11/2010 11:07:42 AM	6/11/2010 11:07:43 AM
102856	E:\Recordings\20100611 \5980\5980-11-07-08.cca	E:\Recordings\20100611 \5980\5980-11-07-08.wav	6/11/2010 11:07:40 AM	6/11/2010 11:07:41 AM
102855	E:\Recordings\20100611 \7517\7517-11-05-50.cca	E:\Recordings\20100611 \7517\7517-11-05-50.wav	6/11/2010 11:07:04 AM	6/11/2010 11:07:05 AM
102854	E:\Recordings\20100611 \7513\7513-10-49-39.cca	E:\Recordings\20100611 \7513\7513-10-49-39.wav	6/11/2010 11:06:35 AM	6/11/2010 11:06:53 AM

In Progress Records

Failed Records

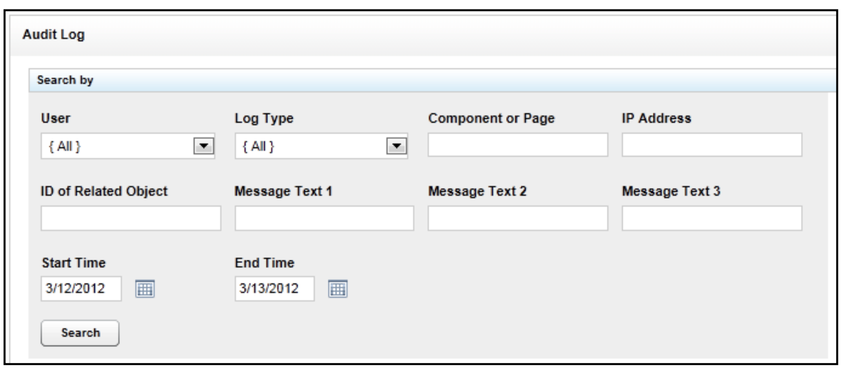
Audit Report

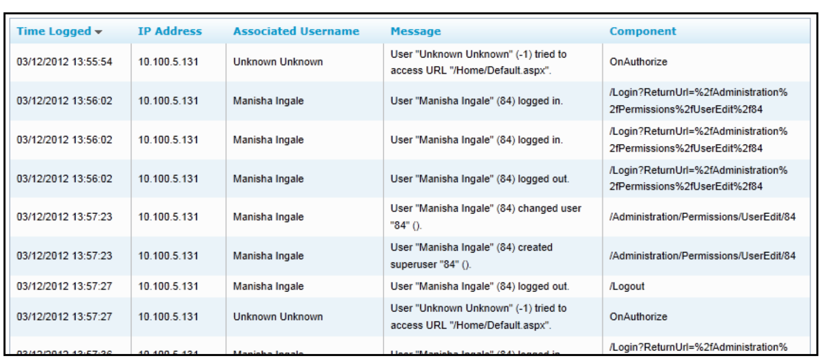
The Audit Report displays the log of specific actions taken by each user in the system. Use the Function Type list to search for specific actions performed by a user, such as Login, Logout, or Change Password. The system generates messages when certain actions are performed for a date range.

> **Note** If a user is logged in on multiple computers or browsers and they log out on one, it will remove them from the list of logged in users even if they remain logged in on the other. This can cause problems with the audit trail as further activities performed by the user on the second machine or browser are not logged for auditing.

Some of the search fields are:

- **Log Type:** This menu shows all the event types that are logged. Examples include User Changed and Changed Password.
- **Component or Page:** cc: Discover system component or HTML page involved in the event. For example, if the user is on the Login page, the event would be a login. AuditLog returns activity on the audit page and audit log.
- **IP Address:** Address of the user whose action caused the event.
- **ID of Related Object:** Call records and audio recordings are objects with ID numbers. Some events, such as login attempts, will not have an object.
- **Message Text 1/2/3:** This feature should be used only for advanced audit investigations. It is most effective for filtering. Audit messages consist of one to three parts. Each part contains different text. After a list of events is retrieved, review the messages to find which events are useful and pick the key words and enter them in the Message Text fields. Determining which words appear in which field involves some trial and error





Time Logged	IP Address	Associated Username	Message	Component
03/12/2012 13:55:54	10.100.5.131	Unknown Unknown	User "Unknown Unknown" (-1) tried to access URL "/Home/Default.aspx".	OnAuthorize
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged in.	/Login?ReturnUrl=%2fAdministration%2fPermissions%2fUserEdit%2f84
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged in.	/Login?ReturnUrl=%2fAdministration%2fPermissions%2fUserEdit%2f84
03/12/2012 13:56:02	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged out.	/Login?ReturnUrl=%2fAdministration%2fPermissions%2fUserEdit%2f84
03/12/2012 13:57:23	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) changed user "84" ().	/Administration/Permissions/UserEdit/84
03/12/2012 13:57:23	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) created superuser "84" ().	/Administration/Permissions/UserEdit/84
03/12/2012 13:57:27	10.100.5.131	Manisha Ingale	User "Manisha Ingale" (84) logged out.	/Logout
03/12/2012 13:57:27	10.100.5.131	Unknown Unknown	User "Unknown Unknown" (-1) tried to access URL "/Home/Default.aspx".	OnAuthorize
				/Login?ReturnUrl=%2fAdministration%

Report Tools

Overview of Reporting Tools

The Reporting Tools make your reporting functions more effective and efficient, and to make reporting as easy as possible.

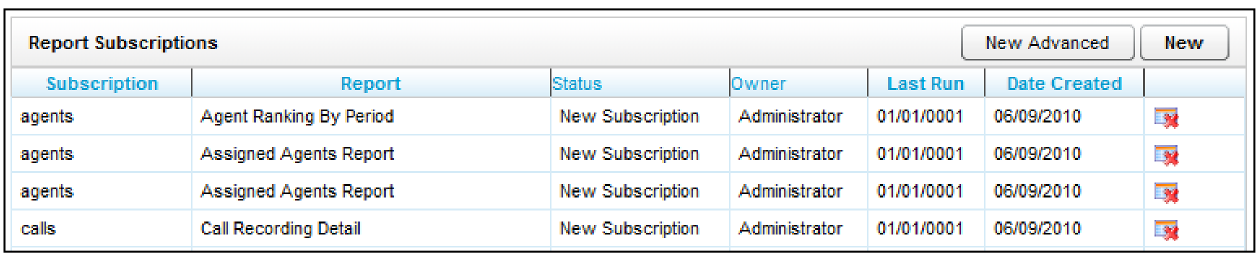
Report Subscriptions

Report subscriptions allow you to set a specific report to run at a scheduled time, and provide the results to multiple users via e-mail.

To access Report Subscriptions, click the **Reporting** tab in the Web Portal, and click on the **Report Tools** menu. The link to Report Subscriptions will be listed on the menu.

Manage Subscriptions

When you load the Report Subscriptions page, you will be presented with a list of any subscriptions you have already configured.


Report Subscriptions New Advanced New

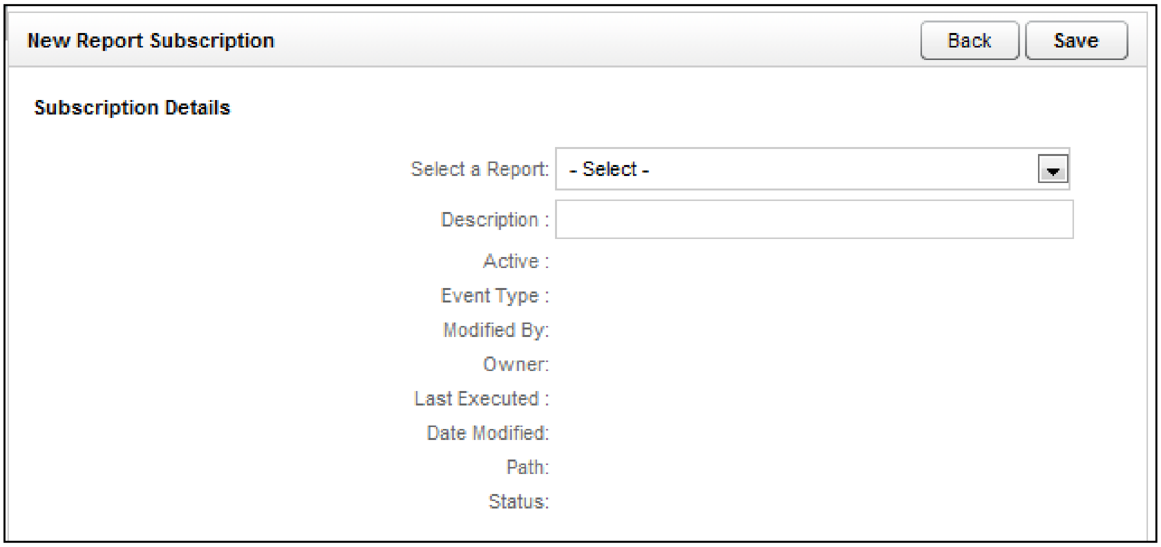
Subscription	Report	Status	Owner	Last Run	Date Created	
agents	Agent Ranking By Period	New Subscription	Administrator	01/01/0001	06/09/2010	
agents	Assigned Agents Report	New Subscription	Administrator	01/01/0001	06/09/2010	
agents	Assigned Agents Report	New Subscription	Administrator	01/01/0001	06/09/2010	
calls	Call Recording Detail	New Subscription	Administrator	01/01/0001	06/09/2010	

Clicking on any of the subscriptions listed will display the subscription settings for editing. To delete an existing subscription, you can click the **Delete** icon from this list.

Create New Subscriptions

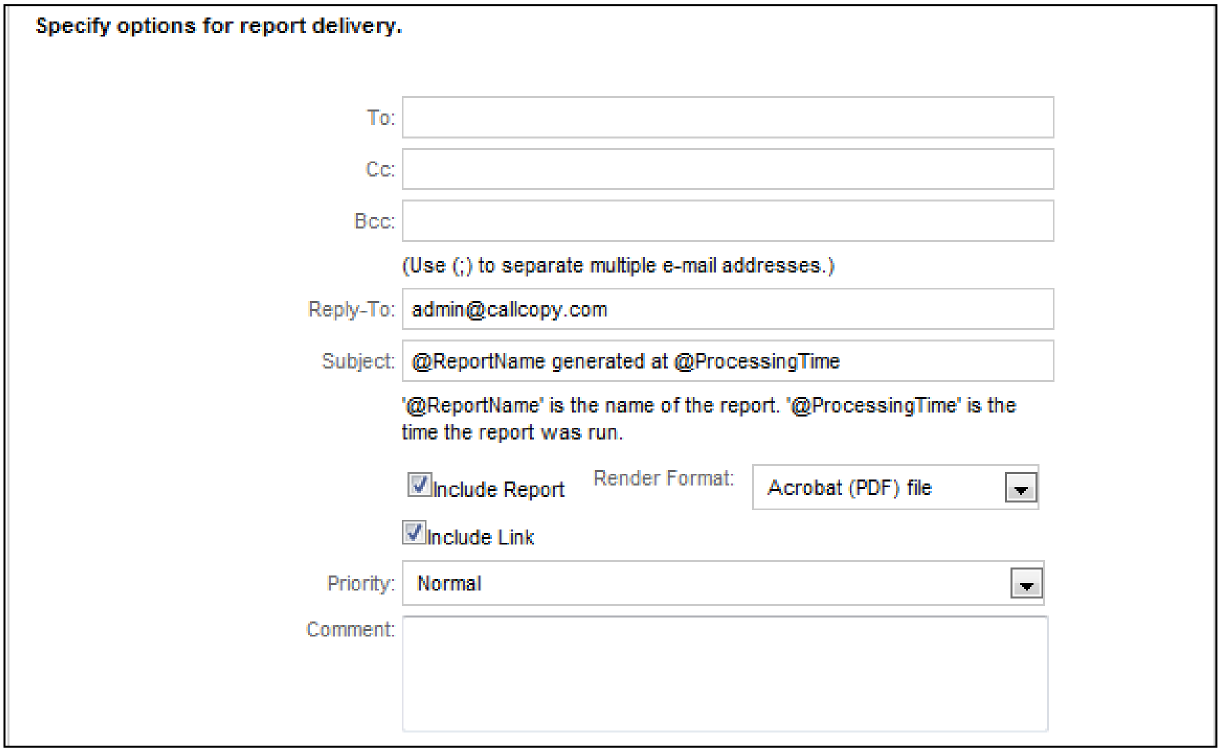
The procedure for creating new subscriptions depends on whether an environment uses the Enterprise edition of Microsoft SQL Server or another edition. SQL Enterprise-edition users create new subscriptions using the New Advanced button. Other versions of SQL use the New button. Only one button, New OR New Advanced, can be used, not both. If you use the wrong button, cc: Discover will show an error message that the subscription was not saved. In this case, use the other button to create the subscription.

1. Click the **New** button at the top-right of the page. The new subscription page will load, displaying sections of settings that need to be entered to create the Subscription.
2. Choose a report from the **Select a Report** field. Any Printable Report currently installed on the system is available to use for a subscription.
3. The **Description** field is a custom title for your subscription. Enter a description in the field.



4. Enter the e-mail addresses the report will be sent to in the **To:**, **CC:**, or **BCC:** fields. (SQL Enterprise Edition users click **New Recipient** and select a cc: Discover user from the drop-down menu.)
5. The **Reply-To** field will be the e-mail address that any replies to the subscription e-mail will be sent.
6. By default, the **Subject** field will display the Report name and the time the report was generated. A custom subject can be entered by the creator into this field.
7. The **Include Report** option will generate a file containing the report results and attach it to the subscription e-mail.
8. The **Include Link** option adds a link to the report file. This option is useful if the report is distributed to a large number of users, which would consume network traffic. The report file is located on the SQL Report Server; thus, all report recipients must be assigned user accounts on the server. (Do not select this option without first discussing it with your system administrator and the CallCopy Install engineer.)

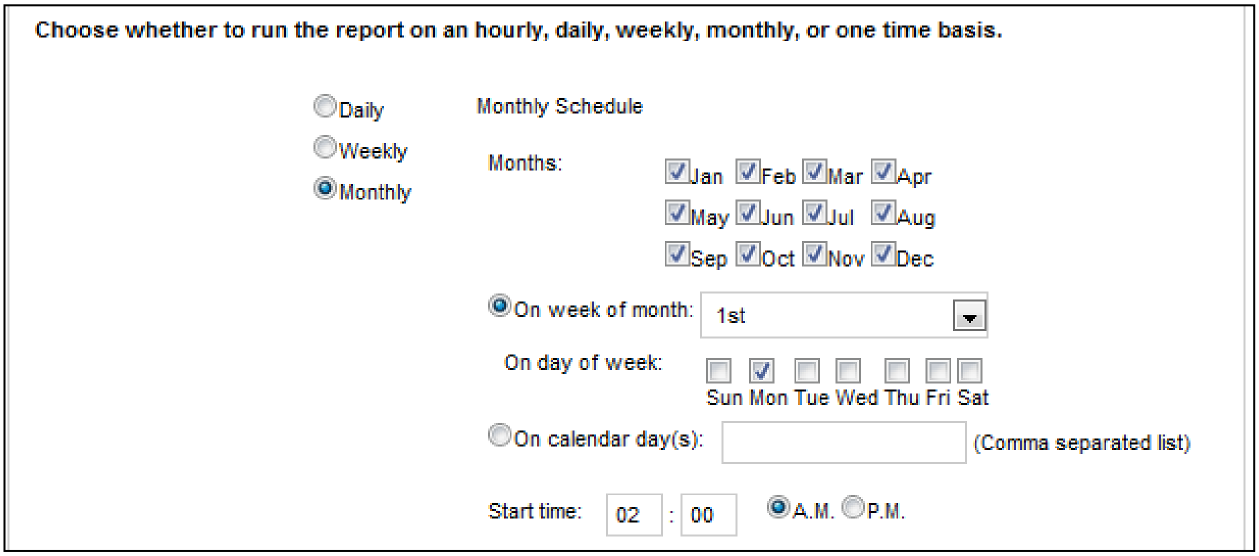
9. Using the **Render Format** option, you can select the type of file that will be attached. Currently, the following file types are supported:
   - Acrobat (PDF) File
   - Excel (XLS) File
   - CSV
   - Image (TIFF) File
   - MS Word (DOC) File
   - Data (XML) File
10. You can set the **Priority** field in order to flag the subscription e-mail at a higher or lower priority for the recipients.
11. A custom message can also be included with each subscription e-mail by using the **Comment** field.



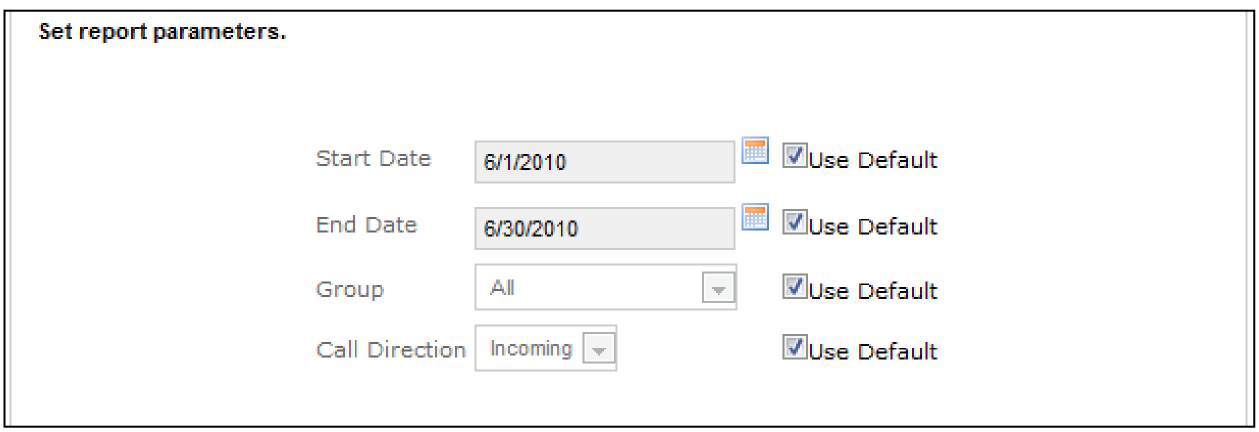
12. Reports can be scheduled to be run
    - **Daily:** If the report should run every other day regardless of the day of the week, enter 2 in the Repeat after this number of days field.
    - **Weekly:** Select the day(s) the report should run.
    - **Monthly:** Select the months, week of the month, and day(s). You can also select the **On Calendar day(s):** option and enter specific dates (in dd format) for the report to be generated.

13. For any schedule option that is selected, you must select the time of day the report will generate with the **Start Time** fields.

    Note It is recommended to select Report Subscription start times outside of peak usage hours for the CallCopy system to minimize impact on performance for other CallCopy functions.



14. Report Parameters are the data options that will be used to run the selected report. The options in this section will vary depending on the **Report Type** selected in the Subscription Details section of the page. These options will be the same as the options for the report when viewed through the **Printable Reports** menu.



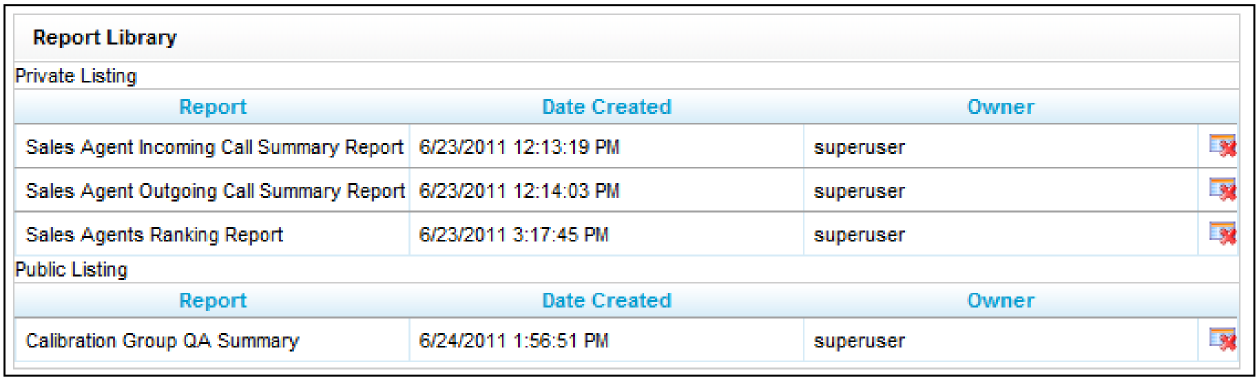
15. Click the **Save** button at the top of the page to save your Report Subscription. You will be taken back to the Report Subscription list, where the newly created report will be displayed as the first item on the list.

Report Library

The Report Library is available under the **Report Tools** menu on the Reporting tab. This page will list any saved report criteria you have created for printable reports.

Select a saved report criteria from the list to run the report.

Delete the saved search by clicking the **Delete** icon.



Report Library

Private Listing

Report	Date Created	Owner	
Sales Agent Incoming Call Summary Report	6/23/2011 12:13:19 PM	superuser	
Sales Agent Outgoing Call Summary Report	6/23/2011 12:14:03 PM	superuser	
Sales Agents Ranking Report	6/23/2011 3:17:45 PM	superuser	

Public Listing

Report	Date Created	Owner	
Calibration Group QA Summary	6/24/2011 1:56:51 PM	superuser	

About CallCopy

CallCopy, a leading provider of innovative call recording and contact center solutions, is dedicated to ensuring the highest standards of customer and employee satisfaction. The award-winning, enterprise-proven cc: Discover suite delivers advanced call recording, screen capture, quality management, speech analytics, performance management, customer survey and workforce management capabilities to organizations of all sizes and industries across the globe.

CallCopy empowers these organizations to gather business intelligence, which is leveraged to maximize operational performance, reduce liability, achieve regulatory compliance and increase customer satisfaction.

For more information, visit www.callcopy.com.